

I had a fascinating chat with Charles Bernard about:

- How trust is critical to business performance
- How not to be a bottleneck as a leader
- The importance of responsiveness as a leader
- The importance of honoring your word as a leader
- Why transparency is critical, especially in today's marketplace
- Having an open door policy
- Being grateful and acknowledging the every day
- Trust in terms of problem solving and team engagement

JL: Good morning everyone! It's time for another installment of PR Patter. I'm Julie Livingston from WantLeverage Communications and I am so delighted today to have with me Charles Bernard of Criteria for Success. Charles brings over 20 years of experience and direct sales, sales management, recruiting, and training and as a sales executive for GE, Charles was the top Revenue producer of his division. He founded and operates criteria for success of improvement training and sales playbook development company based in Manhattan. Some of his clients include the Weather Channel, WebMD, Time Inc, which is now Meredith and British Telecom. Welcome Charles, great to see you today

CB: Thank you Julie and thank you for the honor of the invitation, very happy to be here.

JL: That's awesome. So, our topic today is, you know, building trust, establishing trusting relationships with key stakeholders. You know, we're living in a post-pandemic world and it's dramatically changed the way we live and certainly the way we work. How have these shifts affected leaders and the relationships they build with their teams?

CB: Well I'll start at a macro level. I've been following the Edelman Trust Report and it comes out every year and it's Richard Edelman who's the CEO— it's kind of his pet project.

JL: It's amazing, I really read every word very carefully.

CB: Julie, as you know I have a vested interest in Edelman because for a number of years my daughter Sophia was a senior vice president, and they're very proud of the work she's done. In 2022 the trust report came out with for me, some surprises, and it was almost like it revealed how people were more inclined to distrust than trust, and I think he said something like you know 60% of respondents defaulted to a sort of distrusting mindset. Then the other surprise for me was that businesses in the 2022 Report with the most trusted institutions above the government and media, and media in particular was slammed and I don't want to get political...

JL: I think we all know where that came from.

CB: But I think trust, bottom line to answer your question about leadership, trust I think is critical to business performance, because a lack of trust can report to, can lead to unreported misconduct, lots of damage to the company's reputation, to the reputation of leaders and so

there's another benchmark that I follow which is LRN. They're the Legal Research Network. They focus on ethics and regulatory compliance and stuff like that so it's kind of nerdy stuff, but they also said some interesting thing about how business leaders have to really address some of the distrust in government and some of these places, and big companies in particular. During the pandemic I was very interested in this topic in Cisco, which is a very big company, the tech company had said quite a few things on YouTube. The head of HR and CEO were basically saying that a lot of the employees are relying on the leaders in their own institutions to help rationalize some of the loneliness, some of the mistrust in the messaging. Like what we were talking about you know with the pandemic a lot of missed messages, etc. And just you know, with the riots, if you remember they're all the riots in the street especially around the George Floyd issue and people would just unhappy. People were looking at their companies first and the leaders in their companies and their teammates, the people that you spend all this time at work with, to sort of resolve a lot of these conflicts.

JL: That's fascinating. It used to be your family right, but I think that marks a really big shift for sure. I also think it identifies a huge opportunity and a responsibility.

CB: Yes that you were going right where I was going, which is I think when leaders begin to realize how much employees are expecting from a leadership standpoint from their leaders including the CEO and the Senior Executives. That it really does place a lot of responsibility on their shoulders, I couldn't agree more.

JL: Do you think that leaders overestimate how much their teams trust them?

CB: Without a doubt. I think you know I know there's a lot to be said and I don't want to go down a ton of rabbit holes about leadership by example... I tend to have a lot more of a simpler approach to be honest, and I think these have served me in the clients I've worked with because a lot of these philosophies are difficult to execute, so I kind of boil it down to if you're doing four things, then you can't be overestimated as a leader. And what I mean by that is, number one biggest problem that I think creates mistrust of a leader is when that leader becomes a bottleneck.

JL: Ah.

CB: What I mean by that more specifically is: I work for a leader and I sent you two reports and I'm waiting for feedback or I'm waiting for a decision and it needs to happen soon, and you're not getting back to me. So you're a bottleneck. You've gotta make a decision and you don't.

JL: If the leader does not trust you to make more of your own decisions and be someone autonomous impact they don't if they don't empower you.

CB: Bingo. Along with that, it's immediately connected to what I just said, which is be responsive. Not everything is a decision, but if someone sends you an email, even if it's an FYI email, respond. Leaders are busy, we're all busy. We got hundreds of emails a day. And any

email you sit on, that's gone for eternity. I mean it's like you getting another hundred emails in your inbox, the one you just didn't respond to push down. So I know there's a lot of controversy around, you know, if you block off time to not respond to emails... I think if you're a leader, you've got to respond.

JL: Not only the bottleneck, but it really creates a lot of stress and anxiety in team members. Because I think a lot of people start to imagine, you know, well why aren't they responding to me? Maybe they're not happy with my work, maybe they don't think my idea is worthwhile maybe they're going to put the kibosh on my project.

CB: Maybe maybe it's a passive aggressive move. A lot of people are left with thoughts that are not often a very positive because there's already a bit of a mistrust about you as the leader. So even if the expectation is, there's a lot here for me to process I will work on this today or I'll get back to you tomorrow, which is like a ten second response, and then put a reminder in your calendar. Which I think is the best place to respond to the people you said you would get back to. Number three, which I think is probably the most important, that I think almost goes without saying, but then the moment you realize someone's not doing it it's a major problem. And that is: leaders have to honor their work. So you know, for example, if I'm the VP of sales and I'm responsible for delivering a new compensation plan every year, Julie— can you imagine how many clients of mine don't release the comp plan until mid year, Q1, and the problem with that is that if you've made changes to the comp plan, year after year, 2022 and you have a new change in 2023, but you're not releasing that until Q2, the assumption by the salesperson is that the old comp plan is still in effect but that's not true, because the old comp plan it actually says it expired December 31st. So now the sales persons are in limbo wondering. So honoring your word is essentially setting expectations, making promises, and if you cannot keep a promise because sometimes we just can't help it because life gets in the way, then telling people “I committed to this date but I'm not going to make it, but I will promise to get it to you by this other day—” to me, that's honoring your word. Because yes, you broke the promise however, you will be responsible about it. So this whole idea of my word means something as a leader.

JL: I couldn't agree more. When leaders don't respond and all this stuff happens, it really has a trickle down effect on morale and and motivation and productivity. Why should team members be at their best, at their top energy level, when they're when the leader in charge is not responding or not giving them constructive feedback?

CB: Which is beautiful because again, I see so many situations and I had to learn the hard way— that I would ask for reports. I would say to my sales people that by Friday I need an activity report or a pipeline report and you know, your prospects right? Eventually the sales people started to recognize that I wasn't reading those reports and then they go well, why should I go out of my way to write all these reports for you if you're not even giving me feedback? Like it's going into a black hole. So I think you're dead on. I think it's a two-way street.

JL: So talk a little bit about transparency. This is something that's often on my mind when I'm coaching and providing strategic communications council to clients when I'm ghost writing their

LinkedIn content... Talk about transparency and its effect on building trust, especially now during you know such an incredible time of change.

CB: I think transparency is critical, and it's one of those things that a lot of people talk about but they don't either understand it or they don't practice it. Transparency isn't just blurting out whatever is on the top of your head, because sometimes, and I'm really guilty of this because I tend to be known for giving blunt feedback and then I kind of realize that maybe I didn't take into account the sensitivity of the other person— some people like that, and some people don't. You have to be careful with transparency in the true sense of the word, right. So then when you ask me you know, tell me about transparency, I think it starts with what are you committed to as core values, right. So I'm committed to transparency, I want people to know I don't have a hidden agenda. Sometimes I can't tell everybody everything and there's a good reason why I can't. Someone told me something in confidence, and I can't just share that, right, so I put a withhold in certain situations, but that's not what I'm talking about. I'm talking about core values. So I'll tell you what mine are, not saying they're better than anybody else's, but I just learned through trial and error that besides talking to everyone's bigness, not their smallness— I could think of everybody's bad points, but I always try to promote the good points. I find the good in everybody— that was my mother's, by the way. She'll always find the good in everybody, and I learned that from her. I think my default most valuable core value that I learned was to clean up my message. I tell people that there are going to be times when I give you too blunt feedback, and there's going to be times I'm insensitive, and there's going to be times I do something, so feedback is critical, that's important for transparency. I have an open door policy. It's okay for you to say: "Charles, at that meeting I just want to let you know that I felt very embarrassed when you called me out for being late on that deliverable." And I want people to know that I have this core value and the core value is, I always clean up my messes. So I may not get it right, I may screw up, I may make a mess but I'm committed to cleaning it up.

JL: Look, we're all human. Things happen, we make mistakes.

CB: Exactly. If it means an apology, like you know I get that from your perspective how I gave you that feedback in front of your peers. Number one, I can apologize. Number two, how can I clean it up? I actually did this fairly recently where I had a situation like this and I promised the person that at the next group meeting, I would take a moment and I did, and I basically said I want everyone to be aware that I made a mistake and I'm apologizing in front of this person who I called out and I just wanted everyone to realize that that's not consistent with who I want to be, and if that ever happens to anybody else please call me out on it. To me, it's kind of the head trash, I call it, I get it out of my head.

JL: I think people appreciate that and respond positively to that. You've talked a lot about gratitude, and how increasingly that's an important part of being a leader and developing trusting relationships. How does gratitude work?

CB: You're hitting something that's very near and dear to me. So I have a friend and coach named Joe Applebaum. He's pretty well known in some of my circles, and I told him that I had

built this beginning day routine and end of day routine, which includes looking at my goals blah blah blah. And he said: "I love that! I love the discipline. But could I offer you something?" and I said "of course. I really listen to you, Joe." And he said: "Won't you at the end of every day do three things. One, ask yourself what you're grateful for. Two, who did you help today? Three, who are you going to send an email to acknowledge a good performance? It doesn't have to be big, but it could just be 'Hey, the way you handled that today was awesome.' And maybe I copy the whole sales team." I notice when I don't do that, my day tends to be a blur, but when I sit back and reflect on what I'm grateful for in particular it gives me a sense of having done something purposeful for my day. It wasn't just a whole bunch of back to back meetings.

JL: It's a nice end cap. I write in this monk manual every day, and it gives you prompts for doing exactly what you said. How did you give back today, how did you help others today, what are you grateful for in your life?

CB: I think it's just a nice way to almost separate your personal life, your professional work day like, okay put an end cap like you said on that and now I'm going to watch TV or I'm going to read a book. I'm not carrying all that noise with me.

JL: It really makes you feel good. It just levels off everything. It's a smart practice, it's not woo woo, it's just a smart thing to do. So, we talked a lot about leadership and how leaders build trust with their teams. How does trust play into problem solving and team engagement? Because so many I know so many leaders really struggle with this, you know, how to delegate problem solving and I'd love to hear your perspective on that.

CB: Yeah this is something I spend a lot of time thinking about and working with myself, my own company, and with my clients and you know one of these people you probably figured out that I like to get to the what's the essence of stuff, like if I can get to the root of something, I can do something about it. So to answer your question, I tend to go right to the very essence of what is leading in an organization, what is project management, what is teamwork, all of that. It comes down to me that it's all about conversations. So if I'm speaking and listening and interacting with my leader, or I'm a leader interacting with my people or I'm interacting with my peers, and we're all aligned on getting something accomplished— could be making a sale, it could be developing a product, anything that we're aligned on. I tend to look at the types of conversations that are occurring, and what I've noticed is that some organizations are much more rigorous around the types of conversations because it's all about interaction and communication. So for example, I noticed probably the one conversation that occurs the most that has the least amount of impact on accomplishing goals as a team is what I call opinion passive opinions, like here's what I think, here is this other thing, this guy's not good, this is a problem, blah blah blah, and no one's bringing a solution and they're just commenting on the situation. People tend to forget that if you're on a deadline, or you are out to accomplish something, it's like well, okay I get that that's what you think, but what needs to happen? So then we get into these other conversations which I say, are going to drive action. There's a great book, and this probably goes back to the 50s, and it's called *WORDS THAT PERFORM* by J.L. Austen. He's a British philosopher, and he says that in the philosophy of language there are words that perform. When I say I promise, I

am promising by saying “I promise.” It’s a commitment. Declarations are very powerful. People are kind of skittish about declaring because they don’t want to commit. An example in every day life: I’ll declare this testimony gives the truth, the whole truth, and nothing about the truth and someone’s putting their hand on the Bible, they’re literally saying the words I say are critical. If someone declares they’re married, that’s a declaration. No one gets married until someone declares they’re married. But a leader declares mission, vision, values. It wasn’t something someone else declared, the leader declared that. So I think these sort of ideas of declaring and being purposeful and making decisions generates trust, like if you promised something to me, I trust you’re going to deliver on it. If you request something of me, I trust by making the request that you either going to accept, decline, or counter offer you know. So rather than passive opinions I like assertions, meaning I assert we’re late because this thing’s not happening and this other things are not happening, does anyone agree with me, yes, so then what are we going to do about it? It’s different than someone saying that something is late and what are we doing to do about it and no one knows. I just think this whole idea around being more rigorous about the impact of our word, the impact of our language, the impact of our everyday interactions... I think people tend to forget how significant and important your word is and how what you say matters and I think if a leader can bring that out in a team, that’s important. And you don’t have to have a title, by the way, to be a leader. Have you ever seen that?

JL: I think you’re so right because everybody has an impact on somebody else in an organization. I think mindfulness also plays a part in all of this in developing trusting relationships, you know, really being mindful. It was just what you’re describing about choosing your words, choosing your behavior, and sticking with it and being consistent in your communication. Charles, where could people get in touch with you?

CB: [cbernard@criteriaforsuccess.com](mailto:cbernard@criteriaforsuccess.com). You can find me on LinkedIn, Charles Bernard Criteria for Success.

JL: Thank you so much for joining me today, this was a great conversation. I hope everyone comes back some time for another installment of Julie’s PR Patter.