

Startup to Scaleup: Leading Culture Beyond Your Direct Team with Greg Jacobson | 081

Welcome to Lean Leadership for Ops Managers, the podcast for leaders in Ops Management who want to spark improvement, foster engagement, and boost problem solving - AND still get their day job done. Here's your host, Leadership Trainer, Lean Enthusiast, and Spy Thriller Junkie, Jamie V. Parker.

Do you remember what it was like when you led a small team of individual contributors? You could meet with everyone directly and you all had conversations together, so everyone got the communication directly. And you could directly influence behaviors and culture. And then what about as you advanced? You started leading other leaders who were leading other leaders and leading their teams, so now you have these indirect teams in the organization is growing and you're advancing and you realize things aren't so simple anymore.

Well, today's guest is going to talk through kind of the same type of concept, but a slightly different angle, and it really applies broadly to leaders, even though we're going to go with a specific experience here. Greg Jacobson, co-founder and CEO at Kinesis, is going to talk about scaling a startup.

Now Greg is an ER doctor who started practicing Lean, Continuous improvement and Kaizen in his work. And that eventually led him to co-founding KaiNexus. It's a software platform that empowers organizations to engage more people in Lean and Continuous improvement so that they can have an accelerated rate of change and maximum impact. Now, Greg and I have known each other for years back in my FedEx days, and KaiNexus is actually headquartered in Austin, Texas. So there were even a couple of times when I was able to meet in person when, you know, visiting one of my plants there.

Then in 2019, they actually invited me to keynote the KaiNexus user conference and then I got to meet and engage with quite a few of their customers. And I have to tell you, one of the things I have loved over the years is getting to know the amazing KaiNexus team and, you know, just building relationships with Jeff and Clint and Matt and Maggie and so many great contributors, which is why I'm particularly excited to bring you this episode. So let's dive in.

Jamie: [00:02:34] Greg, welcome to the show today.

Greg: [00:02:36] Well, thank you so much for having me. I am really looking forward to this.

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Jamie: [00:02:40] Yeah, me too. Well, I want to start off and we're going to get to know you a little bit. So we have this question that we ask everyone in our executive series, but I want you to start with a value or a mantra. It could be a principle or quote anything that really embodies your beliefs about leadership.

Greg: [00:03:01] Of specifically about leadership, well, before you said leadership, I'm going to I was going to go with growth mindset, but now that you said leadership, I still think I'm going to go with growth mindset.

Jamie: [00:03:12] I think it applies.

Greg: [00:03:14] It's a hugely important, I think, framework to try to constantly put yourself in. If people haven't read Carol Dweck's book, Mindset, I highly recommend it. And I'm sure you can get the audio book too if you're into the audio book side of things.

And what I think is really important to realize is that none of us are binary. And so within a day or even within an hour, you might be flipping back and forth between growth and fixed mindset, but you'll typically know if you're really in that heavy growth mindset. If you feel a little uncomfortable, if you feel like, hmm, I don't know exactly what to do here.

Try to lean into that because it might. It might mean that you are either trying to get away from a growth mindset and kind of getting into the fix and need to be steered back and forth. Or it might be a situation in which you're learning. So I'll go with mindset, growth mindset specifically.

Jamie: [00:04:13] Yeah, I think that's so important. I mean, I feel like as leaders, we are always like growing and doing things we've never done before and trying to figure things out. And so how we approach that, and I when I had first hired my very first one on one life coach, the very first thing she did was send me that book. Really? Yeah. And so I was like, All right, here we go. And I'm like, What is this? And then I started reading, like, Oh, oh, I see.

Greg: [00:04:40] Well, I love the part about sports. Mm hmm. And I never thought of growth or fixed mindset related to that. But they had several stories in there about people that were so athletic in their

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elementary school years. And then they started to do an activity that they were horrible at to begin with. And of course, they picked the stories where they become Olympic champions by the end. But I think it's it's applicable we can get way better at anything we do if we take the right approach.

Jamie: [00:05:10] Yes. Yeah. Well, a little secret. I'm going to actually. I'm just going to stay on this for a minute because a little secret for me is that this was really big for me when I stepped out to run my own practice, right? And my coach would say, You know, I don't understand, like you are expecting yourself to be as competent at something you've never done before, as you were in this career where you had this 18 years of experience to back it up. And it's just so important. And it really, really hit home for me as I was stepping out to do something new.

Greg: [00:05:40] I was spending time with my folks last night who and my mom was talking to me about my daughter and she was doing something. And my mom was, of course, because your mom never stops being your mom. It doesn't matter how much responsibility you have. And so she was explaining to me, Oh, you know, you always need to tell Micah that she's just doing great and things and give her that confidence.

And I, she said, that's what I did with you. And of course, no, not directly related to growth mindset, but in a way it is because of my story of, well, oh, I want to be a doctor, I'll go be a doctor. I wanted to have a software company. Oh, I'll do. A software company had a life in real estate, and so kind of having that kind of unbridled confidence, not cockiness, but confidence of saying, Oh, if I really set my mind to something and work at it, then you'll probably get a hell of a lot better than you are today at it by doing that.

Jamie: [00:06:38] So, yeah, very cool. Well, let's jump into this software company, then tell us a little bit about your organization. You know, who do you who does your organization serve and how do you create value? Yeah, yeah.

Greg: [00:06:50] So KaiNexus is the software company that I founded with a lifelong friend of mine, Matt Pulseless, and we are a software company that helps organizations develop cultures of continuous improvement. And it started really back in 2005 when someone handed me Masaaki Imai's book Kaizen. I

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was a resident transitioning into a faculty member at Vanderbilt, where I stayed on for a number of years and started to think about, well, how could Kaizen principles be used to improve?

An emergency department could be used to improve health care in general. And it actually never crossed my mind to use pen and paper to do that. And if you go back to mark my book, he doesn't say don't use technology. He doesn't say you have to use pen and paper. And so we were 365, you know, 24/7, 365 organization. We had multiple locations, and so immediately I was trying to build something that was like a Google Doc, a Google Forms and and I was trying to manage things on emails and ultimately had this idea of, well, what have we built some technology that really could help?

People do this type of work much easier and decrease that barrier, and so multiple years later became apparent that building software is really, really hard. And we began this, you know, 10-11 year journey now where we're helping people do all continuous improvement work, whether it's project based or improvement based or KPI based or strategy based. That's what we're doing. And so it's been it's been a fun. It's been the most difficult journey I've ever been in. It makes becoming a doctor look easy. I'm starting a business, so I'll tell you that.

Jamie: [00:08:31] Yeah, well, we will link to KaiNexus in our show notes. So if you want to go learn more about this technology, that can help. You can really expand continuous improvement across your organization. You can go check that out. But let's talk about this, right? Because so this is something that's been hard to do. And, you know, I want to just ask you about a challenge that you face or, you know, maybe maybe you're done facing it or still facing it a little bit today, probably. But thinking about that culture and as you're creating an organization, you're creating a company. Walk me through this through a challenge that that you've had to face. Yeah.

Greg: [00:09:05] So I remember when we were riffing was the last week or so on. You know what would be an interesting topic that we could sink our teeth into? And what was really top of mind was this transition that we were at KaiNexus of teetering on becoming an over 30 person company.

And it allowed me to reflect on what is a leader need to do when you're less than a 10 person organization? I'm using 10. Just because there seemed to be a bit of kind of a chapter turning right at the

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10 person mark and then the 20 person mark and then the 30 person mark, and that was not really articulated very well in a book, so to speak. I remember reading one blog post that says, Hey, when you're at 20 people, there's things are going to start changing in the organization.

And so and so that's kind of what what came about. And we started riffing on that specifically. And I mean, I think probably the easiest way to segment him is when you're when you're 10 people or less, you're interacting with everybody every day. There is no you don't have to be intentional about culture because everyone is influencing everyone consistently.

And the other point specifically about startups, I remember someone give me the advice that in your first 10 hires, you cannot make a single mistake. Period, one one mistake in that early part of a company's career can literally put the company under. And then when you go from like 10 to 20, you start adding people that seem that you may only see once a week or a few times a week and you're not having that.

Greg: [00:10:46] And so you have to be a little bit more intentional about figuring out kind of who we are as a company or who you guys are company and then figuring out a communication cadence for that. And I remember I about the time we had about 20 people in the company was the first time where people started to leave the company.

And I was like, Oh my gosh, what is going on like this is? It was like a knife through the heart because I have the deep connection I had with people. But also it was this wake up call to say, Oh, I'm not interacting with everybody every day, and I'm not, you know, taking the pulse on people. And so as we went from 20 to 30, we we did some kind of reflecting in our, you know, seven years into kind of this evolution of the company.

And it became time to sit down and think, Well, what are our values and what are the traits and what are our beliefs? And so that's what we did. We sat and we wrote them all down and really kind of riffed on them as a senior leadership team to figure out what does it make sense and started communicating that with the rest of the team.

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And I kind of have this recurring task now that says it's 20 percent, 20 percent of my time needs to be thought and spent on connecting with a team empathizing with what people are doing, communicating about things in general, what our beliefs are and looking for these. So I know that was a long monologue there.

Jamie: [00:12:24] But yeah, well, so let's talk about some of this, right? So it sounds like, you know, hey, it's it's really kind of you have to this is a challenge that presented itself. And if you did not figure out how to transition from being in a place where you can, you know you're having these interactions with every single person you have direct leadership capabilities to to now leading through others and creating a culture through others that you're going to have problems, right? It was a must solve challenge.

Greg: [00:12:53] Yeah, it was. You get to that point and people say that you can have maybe. Three, four, five up to seven, eight, nine direct reports, especially if you're in a knowledge based organization like a software company. And so you can start to see kind of at that 20 to 30 mark, you're going to start getting into that tiered situation.

And there is no question that if if this was something we didn't become intentional about and didn't start thinking about. I love Seth Godin's, Seth Godin says the definition of culture is people like us do things like this. So what are people like us and what are those things that we do? And that's probably the first step that we sat down and really thought about and wrote down and started to communicate about. And it was. The feedback we got from from people that had joined the company recently was that it was just overwhelmingly positive and they understood kind of the the bigger sense of who we are and what we're trying to become.

Jamie: [00:13:58] Yeah, OK. So I love that you write. So now you've kind of defined some of this. So talk to me a little bit about this communication cadence and some of the stuff that that 20 percent that you're talking about. So what is it that you do that helps to reinforce, you know, this culture and values like, what are you doing? And that has been maybe been successful for you?

Greg: [00:14:20] Yeah. So from my side, for one, I don't know if it's successful or not. I'd like to think that it's successful. But one thing we do is we we do a weekly meeting where it's stand up and we're we let

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everyone kind of talk about about what they've done for the week and what they're going to accomplish next week. And at the beginning of that, they call it amusing time, and I'll usually muse on something.

And so, for example, our values, for one, they're all printed out right here so I can have easy access to our values and traits. But like, for example, some of our values are weird team to be kind, focused on the customer to, to trust and be trustworthy and work hard and smart. So those are our five values, and usually one of my muses will go back into one of those values or one of those traits. And so I think that's important.

We've done a lot now that we're in this kind of virtual world and hybrid, and we now have remote people. We really focus on doing one on ones with folks. And so we really recommend that people are doing in scheduling just time to. Connect with people and to talk with you. And we're actually thinking about creating some standard work around that because a lot of people are like, what should I be doing during this time and kind of our thought as well? Do whatever you want.

Greg: [00:15:42] It can literally be about just chatting about the weekend. It kind of is trying to replicate this, this water cooler moment. And sometimes it gets right into talking about something that you're working on collaborating. Or sometimes it can be, Oh, I'm working on this. And then you realize there's kind of cross-functional impact for the types of things you're doing and opportunities. So that's another kind of aspect that we focused on. And and then the third aspect we do this annual meeting and a meeting or meeting where we get together and kind of take more of a fifty thousand one hundred thousand foot view.

And the last one was the first time where we spent a significant amount of time talking about value traits where we hadn't done that in the past. It was more tactical and transactional. Ok. This is what marketing is doing, and this is the results and this is what customers are doing in this time. We focus less on that transactional component and more on what I think people would consider the soft component. But I think that the soft component has a huge impact on the hard bottom line.

Jamie: [00:16:46] It does because, you know, right? So I mean, business is personal, right? Like and I say this a lot. You know, when I speak with with organizations is, you know, like, yeah, we love process,

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right? So we're we both are improvement minded. We love process processes. Awesome. But the thing is that so while work is made up of process, organizations are made up of people. Right. And so this idea that we can go all in on the process and then we don't need the people stuff is just not accurate, right? Like we are human beings and there's so much to the whole human that we need to engage.

Greg: [00:17:23] So much of our our brains are kind of evolved into being in these social groups of 100 to 150 people and. A ignoring that aspect is a well, it would be like when you read a book, I think I even talked about in mindset, what did I tell you? I told about the story of the person that started not as a good athlete in something, and then she became the Olympian. I think it was like an archer. I remember what it was, but it was. You think about stories.

Stories are kind of synonymous in a book, kind of transacting information to how do you lead? Well, you can. You really need to do that in a lot of the soft kind of aspects of connecting with people. And so, yeah, those those one on ones and I try to I try to do check ins with with people every two to three months. Mm hmm. Easier than than other times based on your schedule. But I think kind of checking in and seeing what people are doing and what their opinions are. Is super important.

Jamie: [00:18:32] Yeah, for sure. And those one on ones are like, I just want to call out because so many leaders that I talked to don't do one on ones. And the answer they like the reason, not reason, but the what they say is, well, I talk to my people all the time. I talk to people all the time, you know, like, right, so we're we're in meetings where if you're in person, it's, you know, walking down the hallway.

If you're not, it's those, you know, couple of minutes before or after the meeting starts or stops. You know, like we talk all the time, they can call me any time. Right, right. But there's something that is so different about time that's allocated without. I'm here to answer a question. It's planned, so I know it, and it just creates that connection opportunity that doesn't happen in the hustle bustle day to day.

Greg: [00:19:14] Well, what's it's where I learned the most interesting things about the people I work with and their people have super interesting hobbies. We have recently hired people that they're first generation American, and so to hear about their country of origin and the trials and tribulations to immigrate, or just how they're high school and college experiences where I always find super fascinating.

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And so it's there's some really interesting hobbies that people here can access. And so that's that kind of creates that off that open opportunity. But it does. You do need to suspend the Oh, I need to take something off of my to do list during this period and and kind of lean into kind of the moment and become curious about people's lives. And that can be really hard when you're blowing and going as a leader. Oftentimes, you're just kind of going from one meeting to the next meeting and next, and you don't even have time to kind of think or even have a bio break, if that makes sense. And yeah, it's like try to chill out for 30 minutes and, you know, talk about the weather. But so that's one of the I.

I really enjoy doing that and I have some standard work related to that. And so sometimes I can become an introvert at periods of the day, and I don't know what to talk to people about. And so I have just some kind of questions up and I take notes on what we talk about because then I can remember, Oh yeah, three months ago you were working on this crochet project. How's that going? So those are all little. Um, standard work, things that you can add to make the experience more enjoyable.

Jamie: [00:21:02] Yes, for sure, I. And so for those listening, there is I have an episode that's called one on ones that don't suck. And so while it's not like a prescribed agenda, it gives you some ideas around how to structure those one on ones and maybe some things not to do as well.

Greg: [00:21:20] Oh, I hope I didn't. I didn't advise anything you recommend or not to do.

Jamie: [00:21:24] No, it's right. Yeah, it's totally aligned. But yeah, so you could. If this if this part of the conversation is interesting, I will link to that that episode in the show notes as well. All right. So so you're tackling this scaling challenge. You defined core values and who we are and what we do and all of that.

You started some communication, a cadence of communication, bringing more of that communication into the activities and meetings that you have. So this is all some of the stuff that you're doing to tackle this, this scaling challenge from a leadership perspective and culture perspective. Any maybe lessons learned or things that didn't go the way you had maybe anticipated they would?

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Greg: [00:22:06] Well, I mean. I would say probably almost everything I do doesn't completely go the way I think it would go. And I don't think that's what's really as important. And so talking with some of the other day, and I thought most startups by the time, by the time that you get to where we're at have already failed. So from a statistical perspective. And so I kind of look back at the I mean, my journey has been 15 years, but specifically KaiNexus has been, let's say, 10 years. And then more specifically with the the round of funding, it's been really about six seven years for the for what looks like the company does today.

And there's probably been only. Six to eight. Do or die decisions that we've made over this period of time for all the other decisions which there are probably thousands every year that myself were senior leadership or even everyone in the company makes, we probably just need to get about 80 percent of them, right?

It's not terribly critical to nail it. So with all the things that we've done, sometimes maybe they didn't quite work, but everyone knew that the intention was good. And so we. We didn't get kind of bogged down in the failure as much. I'm always hesitant, I know there's this like there's this whole communication about, oh, fail often and all that stuff, and I'm like, Failure sucks.

Greg: [00:23:37] Like, I hate failing. But I think that the real sentiment should be is don't get bogged down when something doesn't go the way you're doing or don't not do something because you're afraid that you may not do it perfectly. And if you take those two things and of course, I mean, no one likes to fail, then I think you just won't get like so tripped up when something doesn't happen the way it should happen.

But I would say probably the biggest thing that we did was just we were not intentional early enough. I think that we became intentional, let's say, around twenty to twenty five employees, team members, and I wish we would have done it probably around 10 earlier. That's probably the biggest one I could say is we just didn't do it soon enough.

And and that I can tell you the reason we didn't do it soon enough. Not that it makes it right, but I mean, you just when you're a 10 person company, you just. You just are so frantically trying to go to the next kind of lowest poll, the next thing that you think is the barrier, and sometimes you don't get up and look

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around and say, OK, where are we? And you know, what's the misstep I'm going to take in 10 steps, not just like this specific misstep. So yeah, I would say not doing it early enough.

Jamie: [00:24:56] Yeah. Well, and I think what you're saying here is like not getting bogged down is the failure is so important. And the reason we like to talk about this type of thing is simply that we need to normalize the fact that things are not going to go as you expect. Right, right. And I know I participate with the Kata Girl Geeks and there's a starter card challenge that that they do where they have like a clicker and throughout you reset it to zero and throughout the day, every single time something doesn't go the way you expect to, you click right.

And it could be anything, right? Like, I thought it was going to be warmer, right? Like, I walked out and it was cooler than I thought, Oh, I was expecting my son or my daughter or whatever. You know, my spouse, whatever, to respond to certain way. And oh, they didn't click the next thing. You know, you've gone through the day and you've got like thirty seven things in the day that didn't go as expected with this idea that that's normalizing, that things don't go as expected and we can still learn. We don't have to get bogged down. We can keep going. And it sounds like that's really critical, you know, particularly as you kind of scale through this through through the unknown.

Greg: [00:26:00] It feels like there are a lot of E.R. doctors that go off and found businesses. And so. The ER is inherently a place where you don't really know what's going to happen next. When you walk into the room, you don't really know how it's going to go about.

And so. Your doctors, the ones that don't burn out and the ones that don't don't get kind of bogged down by indecision or the event or ones that kind of just kind of operate within a framework and say, OK, cool. Well, I know kind of how I get, how I get myself out of trouble or how I interact in this situation and the kind of the unexpected becomes part of the expected. And there's a little bit of a zen kind of moment that I think E.R. doctors that are able to be E.R. doctors for the long haul because there's this 10 year burnout that a lot of people go through.

But the ones that do it for 20 or 30 years and the ones that don't get into this. The patient is the enemy mentality, which a lot of your doctors get into. And so, so kind of coming up with those frameworks that

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allow you to really enjoy the unexpected or kind of I'm thinking like a tai chi like, Oh, this happens. So I'm going to like, turn the energy in this way and make something that could potentially be negative, be positive or something. Kind of. I don't know that came to mind when you said that because my clicker would probably be at 30 or 40 every day.

Jamie: [00:27:33] Right? Yeah, for sure. All right. Well, let's just talk about a couple of other things. So if your best friend were kind of an executive or an executive that was facing this type of challenge right there trying to scale, they've gotten to the point where they can't, you know, just do it on their or they can't create the culture, they can't interact with everybody, and they're trying to scale from 10 to 20 to 30 and beyond. Then what would you say to them?

Greg: [00:28:00] So right now, I think the focus for me is just deep connection with the senior team and trying to kind of create a relationship with them that I hope they turn around and then create with the people that they directly work with from a direct report standpoint. So I think the more the more I can invest in them, then the more they can invest in the people that they directly work with. That's what I would tell that person.

Jamie: [00:28:35] Yeah, and that is so important for listeners. You know, you may you don't have to be an executive in a startup for that to apply, right? So as you're leading, you're going to grow into leadership roles where you're in this exact same situation and pouring into those folks that are in your direction of care and then helping them to then pour into the folks that are in their direct span of care.

Greg: [00:28:52] I mean, we were talking about that because I was thinking, Oh, well, many people that are listening to this probably are going to be in organizations way bigger. And the the arc of going from zero to 30 is probably similar. Like the arc from going from zero to four is not as similar as you're to 30 because I think there are going to be other unexpected things that happen.

But they're going to fit into this arc of scalability and of how is a company going to be created that I will not have direct influence over on a day to day basis? Because at this point, I probably will never have direct influence over everybody and probably wouldn't want to. Because then one of the ways I have always said that I will deem this journey a successful is if KaiNexus it's a living biological organism that if it

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doesn't, hopefully doesn't need me. It probably doesn't need me already, but it certainly if it needs me in the future, I failed as a leader as well.

Jamie: [00:29:50] So, yeah, fantastic. All right. So, Greg, as we wrap up just thinking about those listeners, so improvement minded operations executives, operations managers, supervisors, what words of encouragement or advice would you leave them with today?

Greg: [00:30:04] I think continuous improvement is the single most important thing we can do as leaders in an organization, not because it will influence the bottom line or because it will create the safest workplace, or because you will give you more joy in the organization, which will do all of those things. But.

There is nothing more kind of human defining, then to look at someone and say, Oh, your opinion really matters, and I really recognize that you have intrinsic motivation and you're doing your best and you want to do your best. And and I recognize you as a human and just that validation is, I think, so important to the human experience. And then when you start looking a little bit grander at kind of what's going on in the world, it makes it even that much more important for what we do. So what we do matters as continuous improvement professionals.

Jamie: [00:31:14] Awesome, thank you so much, I love the clothes there. You're right, it absolutely matters. Thank you for joining the show today.

Greg: [00:31:21] Thank you so much, Jamie.

Jamie: [00:31:26] Oh, I'm doing like a little happy dance. This conversation went to places like growth, mindset and intentional culture and a communication cadence and one on ones. Oh my gosh, one on ones. You know, I'm a huge advocate for one on ones. Get on those. If you're not doing them, get on those one on ones.

I didn't know you know where we were going to go with all of the details, and it was just really, really great to hear this. So I'm kind of a little giddy inside right now. But I also thought it was really interesting that this, you know, conversation about culture and people and kind of moving beyond your direct reports.

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That direct influence also takes us full circle back to my conversation with Kerry Siggins, where we were talking about how she's looking to really develop that next level of mid-level managers and that management team. And so that's how we started the series and then kind of ending it here. And it's just it just all fits together really well.

All right. So here is your next step. I want you to think about the folks that are in your span of care beyond your direct reports. So what is the experience of the people that are indirectly in your span of care? Maybe they report to someone who reports to you, for example. So how does that that experience for those that are indirectly in your span of care differ from the experience of those that you directly lead? What's different? How is the experience different? Now that you've identified the difference, what do you think about it, is it positive? Is it maybe not so positive? You know, reflecting on this is really going to help you understand beyond just your initial kind of point of view and the people that you interact with every day, and it's going to really help push you to think about what's happening beyond your direct influence. And it's probably going to lead you to identify one next step to take.

All right. This wraps up our Q1 Executive Series. Now, if you missed anything, you can head back and check out all the episodes. Remember, you can subscribe or follow on your favorite podcast app, or you can also head to [processplusresults.com/podcast](https://www.ProcessPlusResults.com/podcast) and of course, a big thank you to all of our guests in this Q one executive series. Kerry Siggins, Justin Woodard, Jeff Welch, Chris Wilson and Greg Jacobson. Until next time.