

## Something Extra EP 031 – Dan Roberts

**Lisa Nichols:** On today's show, we welcome Dan Roberts. Dan is an author, the CEO of Ouellette & Associates and the founder of HR2IT. Dan, I am so thrilled to have you with me here today. We've spent a lot of time together and just every time I'm with you, I've come away, a better person every time I'm with you because I learn so much from you so I am so excited to share who you are with our listening audience today, so thank you so much for making the time to be here.

**Dan Roberts:** Very kind of you to say Lisa and it's awesome to be here. I've listened to a bunch of these podcasts, and I'm still wondering why you invited me, but I'm honored, and I've enjoyed our time together and love your energy, love the energy you bring to everything you do, Lisa.

**Nichols:** I feel the same way. So we've got a lot to discuss today. You talked to us a little bit about how you grew up.

**Roberts:** Yeah, small town guy. New Hampshire. Live free or die and had great parents. We were, I would say, probably blue collar type family, hard-driving, dad. So I learn a lot from him in terms of work ethic, which I appreciate everyday I had an amazing mom, who is opposite extreme very kind, gentle, caring listening kind of a person, so I was very blessed, very fortunate in my upbringing.

**Nichols:** Well, so you are the CEO for Ouellette & Associates, and you've been doing this for a really long time, but you're not that old. Talk to us a little bit about that journey. How did Ouellette come into what you're doing today?

**Roberts:** Yeah, so, Ouellette & Associates a 35-year-old company and was founded by very visionary gentleman Paul Ouellette and had this vision to develop the human side of technology. So you think about this 80s, it didn't make any sense at all. And we're very, very fortunate today, to be in that sweet spot where technology and human capital are coming together and that's the sweet spot today around the globe and so we are very fortunate to be in that sweet space today.

So I have a phenomenal team, New Hampshire, Seattle, and all of the country and we're out working with Fortune 500 companies to help them really transform IT, transform their companies really move IT up that maturity curve to deliver a strategic value.

**Nichols:** Into that point. You've done some research, right, with Babson, I love your IT maturity curve that you've put together and there's several steps there and you guys really do help them go from... They need to all be at 3.5.

**Roberts:** Exactly, that's a four-point scale. And people have seen these from different sources, but this research was fascinating. 130 CIOs around the country, different industries and what we found was that historically, it was more of a defensive play IT was being told. Move up the value curve or we're going to outsource you. Today. It's more offensive. Our boards and our C-suite peers are saying, IT, we need you, delivering value as a strategic partner and what we call The innovative anticipatory stage 4. Because with so much disruption, we need you looking at around the corner and coming back with ideas on how to orchestrate a new customer experience. How to drive new revenue how to defend against disruption, how to be offensive, and being a disruptor. So we know the stories of the playing field of all those amazing companies that are no longer with us because they missed those turns and so the IT, the technology leaders have that opportunity to really become business drivers as what we call The innovative anticipatory.

**Nichols:** And I know you've got lots of stories about companies that you have worked with that are truly driving the top line. They're driving new revenue for the company. It's not just keeping the lights on anymore.

**Roberts:** Yeah, it's so exciting. I would say I'm feeling really generous today. Maybe 20% of corporate technology leaders are really moving beyond their comfort zone of keeping the lights on, and business as usual, and they're really elevating their game, and they're elevating their team and really building that muscle in their organization so they can show up and be influential, they're becoming trusted advisors, they're being looked at to be in the first meeting of every new initiative to help be that business driver, first and a technologist, second and you're starting to see company IT grow the branding and to call themselves technology, not IT, but technology.

So yeah, big shifts out there, and it's a very dynamic time. I say in the beginning of one of my books unleashing the power of IT, I say there's never been a better time to be in the IT profession, and some people think that's crazy, because of the pace, the complexity, the speed

of change and we're asking people to do things differently, almost on a nonstop basis but when you build that muscle in the organization when you build those new skills, when you have a learning agility type culture when you as an individual, realize I need to be learning every single day, it changes the equation and it does become never to be a better time to be in our profession. So yeah, but if you want to stay in your technical comfort zone of 5-10 years ago, you're toast. Half life of a skill today. Lisa, 18 months. You're seeing a big shift in hiring. We used to hire for a "Ready now" workforce. I need you ready now to go do X now it's a shift to a ready-able workforce. Because I know in two to three years, I need you to do other things, new things. So whole different minds. A whole different mantra.

**Nichols:** And as I think about that, what Ouellette is doing, it's not necessarily, IT specific skills. A company can send their people to Python classes. It is really what some people would refer to as soft skills, but truly the way you refer to them, Dan, is they are core skills, these are core skills. Can you talk a little bit about those competencies you guys compiled a list of competencies.

**Roberts:** Yeah, if you remember that maturity curve I talked about earlier, at the stage 3 and stage 4 organizations, those at a really high performing world class. We just went back to that subset we wanted to figure out is, what are they doing different, what's special about them? And we weren't looking for anything particular, but we did find it was a set of core competencies that they were locked in on as they are thinking about building the muscle, there in current organization, but as they're hiring their next generation of workers, and so it's technology expertise, digital fluency certainly one of 14 though it's not 14-14, it's One. It's things like we today, we need to be really good at business acumen, we've got to show up as business people, we need to be influential, we need to be able to influence the decision-making, the conversation, great, IT leaders will call the baby ugly, when it's a bad idea, right?

We've done a good job at that in the past. We're changed leaders were able to be more agile, we're able to be innovative, we bring leadership a whole different way of thinking, a whole different way of showing up and it's definitely a new skill set.

**Nichols:** And we will maybe put some of that information even in our show notes, so that if companies want to dive deeper we certainly do that. So talk to me a little bit because I know you interview CIOs is all over the country, and not just here at Saint Lois, but all over the country, you have relationships. What do you believe, is a secret sauce that you see in the best leaders, and I think you call it the Seven Cs and I'd love for you to dig into that a little bit.

**Roberts:** It's funny. One of your earlier shows, Jack Lannom, he had seven Cs of trust, so right, but our seas are very different actually. So, Jack had some really great insights from his interview. What I've seen over three and a half decades, Lisa, in this business, every generation is a hype cycle, every generation. There's the buzz words, there's the things that are going on. That are hot and timely supposedly, but the best leaders I find, cut through the noise and consistently I find they focus on the 7 Cs and I've tested this with dozens of CIOs and business leaders and they've said, that's exactly what we're going to do today.

So just very quickly at the heart, it's customer-centricity, and every business leader technology lead a leader worth their salt, starts there right? Know your customer. Amazon their leadership principle number one is customer obsession everything flows from that.

Number two, culture, build that culture, build that culture of learning, that's a big part of this journey and aligned with that is cultivate. So how do we cultivate? It's all about talent, how do we know and grow our people, how do we engage and retain how we build that brand while we attract the best people, big deal.

So I would say the next one would be courage. Business and IT is a tough business and it takes leadership courage and it does taking a whole new mindset to know how to make bets today. And if we don't take some risk, today makes some bets today, we're going to be the next blockbuster. Not to be overly dramatic.

Another one is change. We talked already about change, we have to be very good at leading change, we've got to take our people through the resistance and the cynicism that's out there and take them on this journey we need to take our companies and our business leaders and take them on this journey. It's all about leading change getting people onto changed. Everything that's happening today is changing so fast, right? So having that muscle.

Then the last couple would be around communication, so how do we become better at communicating our message communicating a vision? Ted Colbert, phenomenal business leader, he's the CIO of Boeing, and his quote. One of my favorite quotes of Ted "if you don't like the narrative, change the narrative", right? I just think it's just so well-spoken. Lisa today in this world, we get exposed to about 10000 messages a day. Just think about that. We have the ability to retain and remember about 12. So talk about putting a exclamation point on the need

to be better communicators. Average adult attention span today 8.25 seconds. So we're trying to communicate in this busy world, things moving fast, clutter noise. So how to cut through that?

The last of the 7 Cs is collaborate. And we've got to think about collaboration as a technology organization. Not only chance of being successful is to do as one team and you hear that mantra a lot and you're even seeing it now. Extended externally outside of our companies you're hearing about ecosystems strategic partnerships and ecosystems broader collaboration.

I would say there's probably I call it a bonus C, probably underlines all of these, but it's curiosity and I have some CIOs that are critical, they're like, "Why is that a bonus?" If we don't have intellectual curiosity, we don't have that curious learning mindset as individuals, as organizations we're toast. I hope that's helpful.

AI and ML and blockchain, and disruption, and transformation, all these things, that's just the language de jure of this era. Five years ago, 15-35 years ago when I started... There was a different language, but these best leaders cut through all that.

**Nichols:** And that's foundational. And that doesn't change, right? The buzz words may change, but those foundations like collaboration and communication, all of those things don't change and there's so much packed in there.

**AD:** Well, we're going to take a quick break and we'll be right back with Dan Roberts.

**Nichols:** Welcome back and let's talk about this, you and I have talked a lot about this, but you are seeing such an importance of HR and IT coming in alignment with one another. And there are even companies out there that have HR, IT business partners, and how important that is. Can you talk a little bit about that?

**Roberts:** Yeah, it's a really good point. And this goes back to the talent Achilles and that human capital management, and so what we're seeing is that HR still in many cases has the mindset of "why when I want to get assigned to IT"? That's the short straw, where actually it's the long strides, where the action is today is where the company is actually having the biggest impacts.

So we've actually seen such a gap there that we started last year, an entirely new community called HR2IT, specific for that individual in every Fortune 500 corporation and smaller who faces-off to the CIO and the IT leadership team. We think it's such a vital valuable role. In fact,

I'm writing some different articles for CIO.com under a blog called CIO whispers and I'm writing this series talking about the three unsung heroes for the CIO this HR business partners is one of them.

It comes so valuable and it's interesting because they're trying to show up at a high value in delivering for the CIO and really helping the CIO accelerate up that maturity curve. But they don't quite , that's going on in IT and IT doesn't quite get to how to leverage HR.

So this community is really to bring this together, this peer group and help them elevate their game elevate their profession and really their prominence and the value they can have... because of HR is impacting IT and IT is impacting the company. You get a pretty straight line there, right? So that would certainly be one of those three unsung heroes.

**Nichols:** Yeah, and you saw that there was a clear gap here. Yeah, so that's very entrepreneurial. You see a gap, and you say Okay, how can we solve this challenge? So that's great. So who are the other two unsung heroes?

**Roberts:** Yeah, the other two may be surprising, maybe not, but the other one. And this goes back to one of the Cs, it's around communication and so some CIOs are fortunate to have an IT communications leader as part of their team or assigned to their team, some have actually built entire groups because this whole messaging has become so lightly important. One of the things we see Lisa is with a communication today. Internal becomes external, external becomes internal right? And so getting the CIO positioned in the right industry conference, the right magazine, earning the right awards for the company, that drives a tremendous pride in the organization and makes us realize our company is doing amazing things. And so sometimes that external is more important than the internal... I had a CIO recently tell me, she said, You know, the best way for me to keep a secret, in this company, if I send an email to everybody, right?

So, cutting through that noise comes to that clutter. And so, that's two, and then the third one, and you and I have seen this Lisa with best CIOs, the Chief of Staff, the Chief of Staff is no longer that what we think of as that administrative role, is becoming a strategic role. It's developing one of my leaders, giving them exposure, they would never get helping them build relationships. They become a proxy for the CIO because CIOs triple booked almost all day long. They are running some projects of the CIO can't get to, they're doing a lot of important work and then 18 months later we spend them out and they become one of our key leaders VPs, or

whatever in the organization. So I'd say those are on unsung heroes that we need to really start paying attention to investing in and being more intentional with.

**Nichols:** Well, we got so much to talk about here. We could just go on and on. But you just recently wrote a book, "The Confessions of a CIO". Everyone should go out and get it. You got some tremendous insights when you wrote this book and just maybe touch on a few of those if you would.

**Roberts:** I'd give us shout out to my co-author, Brian Watson and he just convinced me to do another edition of that book. And so what we're doing is we want to write about leadership in a way that helps the next generation elevate their game faster, not make the same mistakes and how best to do that other than go out and talk to the best leaders. And so we did that, we were very fortunate and all but one that we originally approached said Yes, and the one that said no, is because she, her company just didn't allow that, and so we wrote some amazing stories and what was interesting, is we went back. Each chapter has its own personality, about these CIOs, how they make decisions, how they failed and recovered, and they just made a pretty raw and real.

We saw themes that cut across the different chapters and some of my favorites would be answer the call. Every one of them had an answer the call moment. That big call came and it's usually... I need you to move across country to take the global CIO role. I need an answer in 24 hours. I know you have a family, but it's those kind of things. Big call. But as we dug deeper Brian and I dug deeper, we found that it's actually before that is position yourself to get the call and preparing yourself and it doesn't just happen, people think is why I just got lucky I got to call. No, there's a lot behind it.

That's one of them. Another one, one of my favorite is you get the people right, you get the technology right. And so, many organizations do with backwards. My good, dear friend Barbara Cooper she's a Hall of Fame CIO at Toyota. Amazing, amazing person. That's one of my favorite Barbara-isms and she's like... You know "you get the people, right. You get the technology, right."

Another one is the humility. These folks are humble and you see that some people are very prideful and their humility. But these folks are genuine, and it comes through in terms of their self-awareness in terms of their asking questions to learn. Some of them talked about daily, 30 minutes learning every day, discipline, and that's the mark of humility. It's people talking in terms

of when things go well, it's giving credit to others and when things aren't going so well, they put it on me and that I mean it. Our good friend, Don M. Holtz, who introduced us years ago. Don always led like that. And one of my other favorite Don-isms, it goes something like this: and apologies done if I don't get exactly right, but he would always coaches people on projects and initiatives and if things started going off the track, he said "If you come to me early, I can be your coach, if you come to me late, I can only be the judge". But we're just so fortunately be able to spend time with these people and to understand how they think, how they lead, how they make decisions. One of the other ones is you're going to make the call. You don't have enough data today like you did in the past, you might have 70% of the data you need to make a decision you've got to go and sometimes it's a bet the farm kind of decision. But it goes back to c number one, customer centricity. When you are intimately knowledgeable of, aware of, in-tune with your customer, you have a much better ability to make those calls. Make the bets.

**Nichols:** It is so true, I always say if you need to know if you want to know where you need to go as an organization, listen to your customer because they will let you know they will tell you.

**Roberts:** Don't over complicate it, right? I remind myself every day. I'm not a hockey person but Wayne Gretzky has the quote "I missed every shot I didn't take". And you know, we all have that voice in our head that will have 10 reasons why not to make the call, why not to make the shot and take the shot. And I read my myself almost on a daily basis. You got to take the shot.

**Nichols:** Yes, for sure. Well, we've got a couple more things to talk about here. This is something extra. So talk to us about what you believe the something extra is that every leader needs?

**Roberts:** First. Let me just say that I know this is dedicated to Ally and what an inspiring young lady. Thinking about Ally and this journey we're all on. I would say a lot of things, but two plus one. So I would say a couple of things just we've talked about curiosity and anticipate, I think that is really separating leaders and people today is to have that desire to be turn every rock over to be learning, to be curious. And when you build that muscle that ability to anticipate to look around the corner use your secret sauce, whatever it is that you bring the table and anticipate. I think those are really big but I think if I had to boil down to one, Lisa and this goes back to maybe my roots may be some would call it servant leadership probably more popular term but I call it having a net-giver mindset. And I can point back in my career in my 30s. so that was a long time ago, but I can point back to my point in my career, during a recession, where I



just flip the switch and people were hurting people needed help, people need someone just to listen to them and know that you got a story, go up and tell it. Let's help you with this.

But being a net giver is somebody that is willing to say, "How can I help you?", without any expectation of reciprocity, and also when maybe there are times when you do get burned a little bit with that it's going to happen, but not getting jaded staying the course and have that net-giver mindset.

**Nichols:** I couldn't agree more. I mean it's the right thing to do, but here's the thing, when you do give like that, you get so much more back. It just feeds your soul when you know that you're helping someone else.

**Roberts:** You get it back 10 fold but don't expect it.

**Nichols:** And don't ever do it, because of that.

**Roberts:** I love that about you, Lisa. As you and I am traveling and meeting people, and I introduce you to new people. It's like you're all about what can I do to help you be successful? I love that.

**Nichols:** Very good. Well, I'm going to give you the opportunity because I think you have a few really exciting things, getting ready to happen and I want to give you the opportunity to talk about those.

**Roberts:** It's an exciting time in our profession, and I'm so excited about a partnership that we have going on, rolling out this IT leadership development program. The CIOs of the St. Louis community and other cities are realizing technology is the engine. And if we don't have the leadership pipeline, it's not going to happen. The engine runs out of gas.

So really taking people through from multiple companies together through a cohort-based program, and really bringing world-class leadership development to St. Louis. Fostering a better peer network. IT people are terrible at networking until they know how to do networking, so learning from their peers or from each other. And then as you know Lisa, one of the secret sauces of "This is the mentoring program. So many people in this community are stepping up and saying "Yeah, I want to give back. I want to mentor that next generation". And the mentors are getting as much value as the mentees.

**Nichols:** Yes, we're hearing that a lot, right, so there'll be a reverse mentoring component to this thing. So we're launching our first cohort on June 10th, we're excited to talk more about it and you'll be seeing more on this as well. Well Dan, thank you so much for being here, this has just been such a joy. Safe travels back to New Hampshire later on today and thank you for listening.

**Roberts:** Thanks so much, Lisa.