

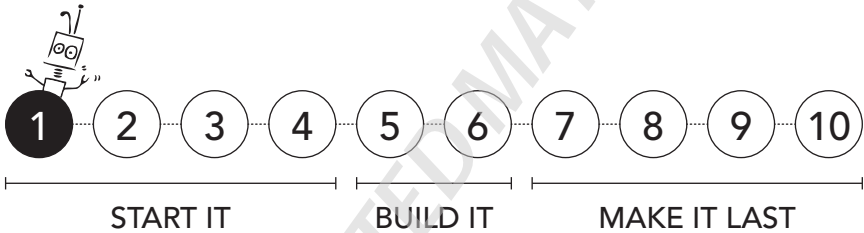
## STEP 1

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# *Shift Your Mind-Set from Expert to Agent of Change*

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## *(The Changemaker Imperative)*



**W**hat do Oprah Winfrey, Morgan Spurlock, and Michael Pollan have in common? All three are agents of change, and none of them is an expert on health. Without any special credentials in nutrition, exercise physiology, or even psychology, all of them have influenced the choices of millions of people in the area of health and well-being. All three have set movements in motion.

Oprah is one of the most influential people in America today. A talk show host, actress, and philanthropist, she has an uncanny ability to influence the choices of millions of people around the world, whether it's what books to read, which diets to consider, or which leaders to believe in. In a 1998 PBS NewsHour broadcast, for example, Oprah spoke candidly about the risks of eating beef, exclaiming, "It has just stopped me cold from eating another burger!" This one interview, disgruntled cattlemen claimed, led to the lowest dip in cattle prices in a 10-year period.<sup>1</sup>

Morgan Spurlock, documentary filmmaker and activist, charmed and activated us in his irreverent 2004 documentary *Super Size Me*. Galvanized by a failed lawsuit against McDonald's, Spurlock took action outside of the courtroom, waging his own campaign against the

megacorporation. In his film, Spurlock led viewers on his odyssey of a super-sized McDonald's-only diet, a regimen of physical activity restricted to fewer than 5,000 steps a day, and visits with health professionals to measure the effects—all to illustrate the deleterious effects of fast food.

At the beginning of the film, doctors laughed at his idea. Within less than a month, however, Spurlock gained 24½ pounds; his cholesterol jumped to 230; and he developed the beginning stages of fatty liver condition. The same doctors who had laughed were now begging him to discontinue immediately or risk losing his liver.

Although it took Spurlock 14 months to lose the weight he had gained, his unhealthy stunt was an enormous success. The film won best documentary at the Sundance Film Festival, was nominated for an Academy Award, and six weeks after the debut of the film, McDonald's removed super-sized items from their menu.

Michael Pollan, journalist and author of several books, including *The Omnivore's Dilemma*, *In Defense of Food*, and *Cooked*, is another example of an unlikely leader of health and wellness. His simple, seven-word advice has gotten more play than perhaps any other nutritional advice out today: "Eat food, not too much, mostly plants."<sup>2</sup> It's not unusual to see experts like Dean Ornish, world-renowned cardiologist and founder of the Preventative Medicine Research Institute, quoting his line regularly in his talks, or to see scientists at the Centers for Disease Control and Prevention spilling into an overcrowded theater to hear Pollan himself recite these same seven words.

How are these *nonexperts* having more of an influence on our wellness choices than *experts* with their slew of scary statistics and depressing data? Each of these nonexperts is an agent of change, and we need more agents of change to turn the tide on our rising health care and well-being challenges. Without a doubt, we need experts, we need research to move the field forward, and we need to take an evidence-based approach toward health promotion. But we also need to augment this expertise with an *activist*-based approach to health promotion.

Experts speak to our brains and tend to overload us with facts—using scary statistics and depressing data. Agents of change, on the other hand, speak to our hearts—and they *move* us. In the words of Seth Godin, best-selling author and marketing expert, "It's not about being the smart guy in the room; it's about making things happen."<sup>3</sup> We need to speak to people's hearts and *move* people to inspire widespread and sustainable change in wellness. This is why your first step in starting

your movement will be to shift your mind-set from just being the expert to becoming an agent of change.

In this chapter, we'll discuss:

1. The key elements of being an agent of change,
2. Preparing for the challenges that you will face in getting your movement started,
3. How wellness movements can get started—top down and bottom up,
4. Obtaining leadership support—by devising a business case and an *emotional* case, and
5. Building bottom-up support.

### YOUR STEP 1 CHECKLIST

- ☐ Build your story bank.
- ☐ Sharpen your changemaker edge.
- ☐ Form your core action team.
- ☐ Make the case—both logical and *emotional*—for your wellness movement.
- ☐ Issue an initial call to action—to leaders *and* employees.

## FROM EXPERT TO AGENT OF CHANGE

In the opening of his most recent book *Eat Move Sleep*, best-selling author Tom Rath clarifies that he is *not* the expert. “Let me be clear, I am not a doctor. Nor am I an expert on nutrition, exercise physiology, or sleep disorders.”<sup>4</sup> And yet he’s writing a book on eating, physical activity, and sleep—and loads of people are buying the book. Why? Because he’s an agent of change with a cause that people—lots of people—want to be part of. Beginning with his personal story of a life-threatening health challenge, Rath confides that he, like his readers, is a patient—and he’s on a quest to find the right answers on how to build a life of vitality, one small step at a time. He asks us (the readers) to join him in this movement.

In his book *Leading Minds: An Anatomy of Leadership*, Howard Gardner, educational psychologist at Harvard University, provides an academic perspective on this important notion of expert versus agent of change. By examining the traits of leaders such as Margaret Mead, Martin Luther King, Jr., and J. Robert Oppenheimer—he identifies each as either a domain-specific or a general leader. Very simply, a domain-specific leader embodies characteristics associated with an expert, a leader within their field, while a general leader manifests elements of being an agent of change, a leader who transcends their domain to reach a broader audience. Gardner describes how Margaret Mead, a leading anthropologist, shifted from being an expert known and respected within her field to becoming a household name. She made this transition by adopting characteristics of an agent of change.

## YOUR NUMBER ONE JOB

Regardless of what's in your job description or the task that's been assigned to you, whether you're internal to the organization or external, your number one job will be to persuade and influence. In other words, you'll need to be an agent of change.

Framing your efforts as a movement is a great way to win the hearts and minds of both decision makers and employees. Chesapeake Energy, an Oklahoma City-based energy company, is refreshing its wellness platform, moving from the classic model to a “Join the Movement” model, which emphasizes intrinsic motivation, focus on culture, and a more interdisciplinary and collaborative approach to wellness. When Amanda Parsons, employee health analyst, presented the new platform to the senior leaders, the response was supportive. She successfully accomplished getting buy-in from the top, in part by connecting wellness to a higher purpose in addition to business relevancy. These elements are both critical, as we will discuss shortly.

Starting a movement begins with *you*, meaning that you need to be thinking about what it takes to lead change within your organization. It's no coincidence, therefore, that Leslie Ritter, head of the well-being initiative at Eileen Fisher, a New York City-based fashion company, has the title of “wellness leader.” Regardless of your title, your mind-set needs to shift to being a leader and an agent of change.

## ELEMENTS OF BEING AN AGENT OF CHANGE

Let's break down what's actually involved in becoming a changemaker.

1. **Agents of change know their why.** Leaders who move us have a deep sense of purpose and a deep sense of conviction. *They know their why.* When they model this, they encourage others to do the same, and they create a ripple effect of change in their wake. The clearer you are about your personal why—why you do what you do and what moves you on the deepest level—the more people will want to follow you.

Shane Valentine, chef and activist, models leadership that starts with his personal why. He's leading Kids Cook with Heart, an American Heart Association program that's teaching and inspiring kids and teens to cook healthy meals. Under his leadership, the program now reaches over 4,000 kids and teens. Valentine's why is a startling statistic: So few kids in America are meeting the American Heart Association's Simple Seven criteria for a healthy heart that the total number is statistically equivalent to *zero*. The breakdown? Unhealthy diet.<sup>5</sup> When he shares his why, he inspires others to join him in his movement to "cook with heart" in a way that data alone never could.

2. **Agents of change speak to the heart.** Agents of change are emotional geniuses; they value emotional quotient (EQ) over intelligence quotient (IQ). And they're right to do so. According to Daniel Goleman, author of *Emotional Intelligence*, "After analyzing 181 competence models from 121 organizations worldwide, we found that 67 percent of the abilities deemed essential for effective performance were emotional competencies. Compared to IQ and expertise, emotional competence mattered twice as much."<sup>6</sup>

Any marketing and advertising professional knows that we buy with our hearts and later justify with our minds. Perhaps one of the greatest examples of how much an emotionally charged advertisement can shape our choices is the MasterCard "Priceless" commercial that first aired during the 1997 World Series. This campaign single-handedly catapulted MasterCard from a distant second to neck and neck with Visa.

Jonathan Haidt, psychologist and author of *The Happiness Hypothesis*, originally proposed the metaphor of the "rider" and

the “elephant” to help illustrate the power of our emotional side over our thinking side. When making a change—or trying to influence others to make a change—we cannot speak only to the rider (our thinking side), and ignore the much larger elephant (our emotional side). Whether it’s change on an individual level, a team level, or an organizational level, we need to get the elephant on board first. Only after the elephant is on board can we “direct the rider.” If we don’t have the elephant on board first, it’ll be an uphill battle from the start.

3. **Agents of change are great communicators.** Motivating the elephant—and gaining this emotional buy-in—starts with being a great communicator. Agents of change deliver compelling messages that we want to follow, and these messages are often short, exceedingly simple, and filled with metaphors. In his memorable “I Have a Dream” speech, Martin Luther King, Jr. moved his listeners through metaphors like “Let freedom ring” in lieu of statistics. Communicators also create powerful *experiences* for their followers, usually in the form of stories.

This means that agents of change need to master the art of storytelling and, more important, *value* stories over statistics. “Stories are just data with a soul,” said Brené Brown, speaker and author.<sup>7</sup> As leader of a wellness movement, you’re now in the business of persuasion, and storytelling is one of the most powerful ways to wield influence.

Bill Baun, longtime leader in the field of workplace wellness and wellness officer at MD Anderson Cancer Center, a Houston-based medical center, always leads through storytelling. In delivering talks around the world and in moving people and organizations to embrace wellness, he shares stories, including his own as a cancer survivor. He understands that a movement starts with the heart.

Researchers like Uri Hasson at Princeton University have studied the science behind what storytelling does to the listener’s brain. Hasson’s research has shown that when we hear compelling stories, parts of our brain actually light up in brain scans (that would not light up with statistics alone). This leads to what Hasson refers to as “brain to brain coupling” (between storyteller and listener).<sup>7</sup> To get people on board with the wellness movement you’re starting, you’ll want to catalyze

brain to brain coupling. Good storytelling is the only way to make this happen.

## ACTION ITEM

### STORY BANK

Build your story bank. I always encourage wellness leaders to recall stories, keep a tally of these stories, and use these to build a story bank. These stories—much more than the statistics—are what will move people.

4. **Agents of change embody their stories.** “It is important that a leader be a good storyteller but equally crucial that the leader embody that story in his or her life,” writes Gardner.<sup>8</sup> This means that as the leader of a wellness movement, you’re going to need to take action in your own well-being. This is exactly what Arianna Huffington did. After collapsing in her office due to exhaustion, Huffington made a commitment to always get a good night’s sleep. Success, as she now defines it in her most recent book *Thrive*, is more than just money and power. Rather, the “third metric” of success encompasses well-being, wisdom, wonder, and giving back.<sup>9</sup> Huffington’s sharing and embodiment of her story is what awakens and activates others to follow her movement.
5. **Agents of change do whatever it takes.** Chade-Meng Tan, Google employee turned Nobel Peace Prize nominee, anointed himself “Jolly Good Fellow” and volunteered himself as the official greeter at Google. U.S. Rep. Earl Blumenauer has been known to dress up in a chicken suit and deliver stand-up comedy. And, Oprah boldly danced onstage with Tina Turner for 5 minutes and 27 seconds. Becoming an agent of change requires great courage, and doing whatever it takes to move people to join your movement.
6. **Agents of change don’t wait for permission.** Agents of change do whatever it takes to make a difference, and they

don't wait for permission. This is perhaps the most critical component to becoming an effective agent of change. The classic model for workplace wellness calls for obtaining senior leader support first, but as an agent of change, you can start a movement *without* waiting for permission. Spark a bottom-up movement that builds more organically (perhaps one team at a time), nurture it so that it gains momentum, and *then* bring senior leaders on board.

Malala Yousafzai, recent recipient of the Nobel Peace Prize, didn't wait. She stood up to the Taliban and in doing so started a worldwide movement to support girls' education. Vivienne Harr, founder of Make a Stand, also didn't wait for permission, nor was she deterred by what most would see as a barrier: her age. At the tender age of nine, she started her own nonprofit—or “giveness” (as opposed to business)—with the goal to end child slavery. She set up a lemonade stand and asked people to give “what was in their hearts.” Within six months, she successfully raised over \$100,000. In her view, being an effective agent of change requires “thinking like a kid.”<sup>10,11</sup>

To follow in the footsteps of change agents like Oprah Winfrey, Morgan Spurlock, and Michael Pollan, you'll need to do the following: (1) be very clear about your personal why, (2) hook people on an emotional level first, (3) communicate your message through metaphors and stories, (4) embody your message, (5) do whatever it takes, and (6) most importantly, don't wait for permission.

## ACTION ITEM

### 8 ACTIVITIES TO SHARPEN YOUR CHANGEMAKER EDGE

1. Ask yourself, “What is my why?” While words are good, often images are better. I suggest you use images or creative instruments like colored chalk or markers or even crayons. Try writing out your why on a chalkboard, and then ask a friend to take a picture.



2. The next time an employee asks for advice, consider responding with a compelling question. Instead of telling people what to do, help people to find *their* why.
3. Instead of “selling” leaders, managers, and employees on wellness, design *experiences* for them. Experiences move people, as we saw with the ALS Ice Bucket Campaign. By simply tying the ask (for a donation) with a dare to dump a bucket of ice water over one’s head, the ALS Association tripled its annual fundraising to the tune of \$115 million.<sup>12</sup>
4. Remember that becoming an agent of change is a process. Everyone has it within them to become a powerful agent of change. You are no exception.
5. Being an agent of change means finding and sharing your voice. Channel Rep. Blumenauer to explore creative—even outlandish—ways to share your voice. What will be your version of dressing up in a chicken suit to deliver a stand-up comedy act?
6. Stop gathering statistics and start collecting stories. Buy a notebook, label it “My Story Bank,” and get started!
7. Instead of themes, organize campaigns around big questions.
8. Use metaphors to light the fire for your movement. Metaphors like “placing the oxygen mask on yourself before your child” help leaders to understand better why their personal well-being matters so much to their people.

## GET READY FOR A CHALLENGE

Let’s be clear, leading a wellness movement is not for the faint of heart. You’ll have lots of hurdles to clear, and here are some that you can expect:

- **Buy-in from decision makers:** To have a broad impact, it’s vital that decision makers see the value of investing in employee

health and well-being. Your challenge will be to win their support.

- **Management engagement:** Leaders and middle managers may support wellness, but it's best if they actually participate in the wellness programs. Your challenge will be to empower them to take part.
- **Employee engagement:** The more engaged the employees are, the more likely they are to participate. Your challenge will be to create the conditions in which employees are likely to motivate themselves, feel inspired, perceive value in well-being, and authentically commit to their own health and well-being—as well as the well-being of others.
- **Culture:** A healthy, vibrant culture will buoy your wellness movement. Your challenge will be to slowly build a culture that supports well-being and makes it “okay” to take part in wellness activities.
- **Environment:** The environment creates the opportunity—or lack thereof. Your challenge will be to help build an environment that makes it easy to invest in one's health and well-being.
- **Accountability:** You'll need the right mix of accountability (on both sides—organization and individuals). Your challenge will be to build this over time.
- **Changing behaviors:** Behavior change is what many consider to be the Holy Grail of workplace wellness. Your challenge will be to build a strategy and devise programs that actually move employees, managers, and leaders to form new well-being habits.

## ACTION ITEM

### FORM YOUR CORE ACTION TEAM

To help you to navigate these challenges, pull together your inner circle. Who are one or two others within your organization who can join with you to form a “core action team” to start the movement?

## WELLNESS MOVEMENTS CAN START AT THE TOP

Yvon Chouinard, founder of Patagonia, issued a call to “Let My People Go Surfing,” stirring a movement within his organization, daring other companies to follow, while laying the foundation for an organization that is built on well-being and vitality.

The Cleveland Clinic’s best-in-class Total Care Wellness Program is the embodiment of another movement that started at the top. The program is based on an ethos of belief: belief that change is possible for every individual and that these changes can happen as a result of workplace wellness. To reinforce this ethos, every month in an address that goes out to all 43,000 employees, CEO Toby Cosgrove highlights stories of coworkers who have transformed their lives by taking part in the company’s wellness program.

These monthly talks are part of a larger strategy, primarily led by chief wellness officer Michael Roizen that emphasizes supportive culture and environment, quality programming, and incentives. Since 2008, over 3,000 employees have registered to participate in the on-site yoga classes, over 30,000 employees have enrolled in the online coaching program focused on healthy eating and weight maintenance, and an average of 30,000 visits are made every month to the on-site fitness center. In 2013, the company’s health care costs actually went down by 0.6 percent.<sup>13</sup>

Nintendo, a multinational consumer electronics company, is another example of an organization with a wellness movement that started at the top.

### THE STORY OF NINTENDO

“All you need is at least one person who is willing to champion it,” Flip Morse, senior vice president of corporate resources of Nintendo, a leading electronic entertainment company, explains about his company’s wellness program.

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“It only takes one executive who is at a high enough level to influence policy. And you need to have an executive team that either supports it, as we have at Nintendo, or, at the very least, will not resist it.”

The key piece here is that Flip and his fellow Nintendo executives *believe* in wellness—and they recognize it as a value, as opposed to a transactional equation. “Not only is wellness the right thing to do—employees are happier, they’re more productive, they show up more regularly for work. But also from strictly a financial perspective, it’s crazy not to offer it,” he says. “You can pay a lot of money to consultants for teambuilding, or you can go to one of [our] events, where . . . employees are riding or running together, standing together in a tent talking about road conditions, having conversations you’d never have otherwise with coworkers in a work setting. You’re all the healthier for it, and the next time you see them at work, you have a new bond with them.”

Here are some of the ways that Nintendo’s commitment to wellness has paid off:

- 94 percent of its workforce declare themselves to be tobacco-free.
- Of the 6 percent that admitted to using tobacco, two-thirds of them elected to enroll in a tobacco cessation program.
- Of those that chose to enroll, about 25 percent were successful in quitting tobacco use.

*Source:* Flip Morse, interview with author, October 31, 2014.

For Nintendo, Patagonia, and the Cleveland Clinic, investing in wellness is more than just a program; it’s a movement. It’s more than numbers; it’s a belief system that encompasses a way of being at work and in the community.

## WELLNESS MOVEMENTS DON'T ALWAYS START AT THE TOP

While it certainly makes it a lot easier if the leader of the movement is a CEO, company founder, or member of the executive team, the truth is that *anyone* within an organization can spark a wellness movement.

Bill Baun, wellness officer at MD Anderson Cancer Center, describes a bottom-up movement he witnessed in one organization. A group of employees organized a pickup basketball game during lunchtime. This was their idea and they certainly hadn't asked for permission. Over time, this lunchtime activity gained momentum—and eventually caught the attention of senior managers. Inspired by what they saw, the senior managers took the initiative to build a gym to encourage these employees to keep playing basketball and to support others in getting active during lunchtime.

At Schindler Elevator Corporation, a leading global manufacturer of elevators, escalators and moving walks, another bottom-up wellness movement is taking hold.

### THE SCHINDLER STORY

Julie Shipley, manager of general training at Schindler Elevator Corporation, hatched an innovative idea to incorporate well-being into a leadership-training workshop for the leading managers in the company. Naming it “Leadership Odyssey,” Julie wanted every participating manager to embark upon a personal journey of well-being and understand how this connects with what it means to be an effective leader.

To make it happen, she started a movement and then began building it. She got her immediate supervisor on board, Mike Yurchuk, director of organization development, along with the vice president of human resources. Then she asked our company, Motion Infusion, to help out. In a collaborative and participatory

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fashion, all of us worked together to build a two-day leadership-training workshop. The workshop combined personal well-being experiences, such as yoga, walking meetings, and well-being self-assessments with leadership development and culture change training.

This workshop single-handedly started a movement. Says Mike, “I never experienced something like this in any program or any type of work experience. I think my expectations were that people would gain another perspective, but I never expected that people would believe in it to the point where they would become agents of change.”

What Julie started was not just another program. Rather, it was a *movement* that continues to grow. Participants are sharing success stories on an ongoing basis, many are leading their teams in stretches or encouraging walking meetings, and some are now using standing desks. They’re encouraging team members to invest in rebuilding their energy, and they’re engaging in deeper conversations about emotional and social well-being. Most importantly, all of the managers now look at their team members through the lens of well-being—and this has shaped how they now lead their teams.

The vice president of health and safety at Schindler recently “got the bug” and requested the same workshop, but geared toward his team of safety area managers. Following the workshop, called “Safety Odyssey,” each of these managers, in turn, has gone on to build a movement within *their* respective teams. It’s even spreading internationally, with some global offices starting similar wellness movements. What we see here is a great example of the power of a *bottom-up* movement, sparked by one person’s idea, that is working its way up and infusing itself into the fabric of the organization.

Source: Julie Shipley and Mike Yurchuk, interview with author, December 12, 2014.

## MAKING YOUR CASE

Whether your movement is top-down or bottom-up, at some point, you're going to need to make a compelling case to leaders as to why the organization should invest in workplace wellness.

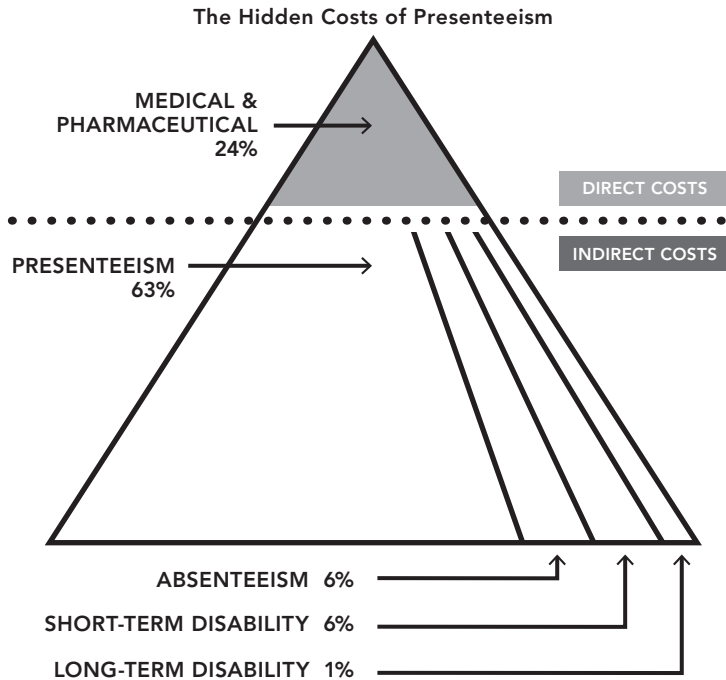
Let's now look at the nuts and bolts of building your case. Below are some strategies you can employ that will help you to move leaders beyond the singular, cost-oriented return on investment (ROI) mindset to see the bigger picture and value of workplace wellness.

**Strategy 1: Focus on the costs *beneath* the surface.** Quantifying direct reductions in health care costs generated by wellness programs is notoriously difficult, especially when the program is in its infancy. It turns out, however, that there are much greater costs—and opportunities for savings—*beneath* the surface. The indirect costs related to poor health and diminished well-being include absenteeism, disability, and presenteeism—all resulting in a net loss in productivity.

One study showed that absenteeism due to disability and illness is costing the U.S. economy about \$468 billion annually.<sup>14</sup> The biggest cost, however, is what's called "presenteeism," which means showing up in body but not being fully present. There's an abundance of evidence to suggest that the costs of presenteeism (due to distractions from illness or disability) are higher than the costs of absenteeism (due to illness or disability). In other words, it costs the company more money to have checked-out employees come to work than if they were to just stay at home!<sup>15</sup>

According to a study conducted at Bank One, direct medical and pharmaceutical costs to a company only account for 24 percent of total costs associated with employee poor health. On the other hand, presenteeism costs account for a whopping 63 percent of total costs to the organization.<sup>16</sup> A recent study found that almost a quarter of employees are reporting that they're not fully present on the job due to chronic illness, adding up to 2.5 billion impaired days per year in the United States.<sup>17</sup>

Your job will be to help senior leaders make the connection between employee well-being and productivity at work—and that direct health care costs are only the tip of the iceberg.



Source: Bank One. Adapted and reprinted with permission from “Presenteeism: At Work–But Out of It,” by Paul Hemp. *Harvard Business Review*, 2004. Copyright 2004 by Harvard Business Publishing; all rights reserved.

**Strategy 2: Focus on the *value* instead of return on investment.** Given the controversy of the ROI conversation, there is now a shift toward presenting the “value proposition” of wellness, or “value on investment” (VOI). The latter focuses more on the broader benefits—and doing something that’s good for employees. Wellness, particularly a more holistic *well-being* platform, can help to build a thriving, vibrant workplace that boosts morale, fosters engagement, enhances human performance, and attracts and retains top talent. An increasing number of workers, especially millennials, now *expect* potential employers to care about them—and this includes offering workplace wellness.

While these broader benefits are more difficult to measure, this value-based rationale for workplace wellness can help to create a better culture around the program itself. This enhanced culture, in turn, can increase the likelihood of employees’ authentic engagement with the wellness offerings. If an organization’s primary focus is on ROI (doing what’s good for shareholders), employees are likely to feel that any workplace wellness program is something that is being “done *to*” them.



Focusing more on the *value* of wellness, on the other hand, can make workplace wellness feel like something that is being “done *for*” employees. Generating this perception is absolutely critical for sustainability.

**Strategy 3: Build a business case based on specific organizational needs.** Every organization has different needs. Key to your success in winning over top management support is tailoring the message to fit the core objectives of your organization. Celina Pagani-Tousignant, president and founder of Normisur International, a global consulting firm that specializes in corporate social responsibility, and Asako Tsumagari, founder and CEO of MEvident, a wellness services provider, suggest applying a four-part “Value Creation Framework,”<sup>18</sup> developed by McKinsey & Company and the Boston College Center for Corporate Citizenship, to build a case for workplace wellness based on organizational need.

### Value Creation Framework

Marketing Creation (focus on innovation and launching new products)	Efficiency in Operations (focus on efficiency and cost containment)
Risk Management (focus on safety)	Leadership Quality (focus on leadership development and retention)

*Source:* Adapted from Value Creation Framework chart, created by Celina Pagani-Tousignant and Asako Tsumagari in “Designing an Effective Corporate Wellness Strategy.” Used with permission.

Companies, like Safeway, a national supermarket chain, that are operating at a relatively low profit margin, are most concerned about operational efficiency and cost containment. With this kind of company, you’ll need to focus on increased productivity (to enhance efficiency) and containing medical and workers compensation costs. Companies like Con Edison, a utility company based in New York, on the other hand, are largely focused on risk mitigation. With this kind of company, you’ll need to demonstrate the connection between wellness and safety. Companies like Google are generating a much higher profit margin per employee. Therefore, their focus is less on containing medical and workers compensation costs and more on innovation and launching new products. They’re looking to wellness as a way to help spark collaboration, creativity, and energy. Finally, companies like

Cisco Systems, a multinational company specializing in networking equipment, are focused on developing leaders over the long term. In a case like Cisco, you'd be wise to focus on talent attraction and retention.<sup>19</sup> In general, for companies that have a younger demographic and are in an industry where they are competing for talent, attraction and retention is a huge selling point to senior leaders.

**Strategy 4: Make the emotional case.** Up to this point, we've focused on cost-benefit analyses for gaining decision makers' support for a wellness movement. Let's not forget, however, that even CEOs and CFOs are moved by their hearts, not just by logic. In fact, I would argue that each is moved just as much, if not *more*, by the heart. That's why it's critical to make an effective business case *and* an effective *emotional* case. The best way to make the emotional case is through stories—particularly stories specific to the organization.

### TIP: HOW TO RALLY THE LEADERS

You need to show leaders that workplace wellness is both the right thing to do (appeal to the heart) and the smart thing to do (appeal to the brain).

**Strategy 5: Connect wellness with a higher purpose.** A singular focus on ROI is only part of the picture and misses the larger point—namely, making a difference in people's lives. Investing in workplace wellness is about *doing the right thing*. According to Dee Edington, longtime leader in the field and author of *Zero Trends*, “We [wellness providers] were forced into making the ROI proposition to get decision makers on board with health promotion in the workplace.”<sup>20</sup> Fortunately, this is changing.

Robert Safian, editor and managing director of *Fast Company*, writes about “a rising breed of business leaders who are animated not just by money but by the pursuit of a larger societal purpose.”<sup>21</sup> Mission-driven companies like Patagonia are increasingly becoming the norm. You can ride this wave to lift your call for workplace wellness to a higher purpose.

Ultimately, workplace wellness is about people, not just costs, and an increasing number of leaders are catching on to this. For leaders like Jamie Dimon, throat cancer survivor and CEO of JPMorgan Chase,

workplace wellness comes from the heart and is about doing the right thing. In a recent memo, he reminded his employees, “As always, and especially since my diagnosis, I followed the advice I give to others—take care of your health first—nothing is more important.”<sup>22</sup>

### CHECKLIST TO BUILD YOUR CASE

To help organize your thoughts, below are some prompts to get you started on building both the logical and emotional case for your movement.

Your personal why:

How this initiative builds on your why:

Your organization’s mission:

How this initiative supports the mission:

Your organization’s values:

How this initiative supports the organization’s values:

Your organization’s core business objectives:

How this initiative supports these core business objectives:

What people want:

How this initiative supports these wants:

What people need:

How this initiative supports these needs:

The *logical* case for the initiative:

The *emotional* case for the initiative:

### SPARK “MINI-MOVEMENTS”

Finally, you want to think about how you can generate a widespread movement, sparked by a series of “mini-movements.” One tool that has gotten a bad rap in workplace wellness is the good old-fashioned lunch ‘n’ learn. As a former teacher, I always bristle when I hear that education

doesn't work when it comes to changing behaviors. The truth is that *good* education can work. *Bad* education, on the other hand, doesn't work—and that's what I've seen in most lunch 'n' learns. Below is a classic example of bad education in action.

### THE STORY ON HEALTHY AGING FOR WOMEN

I was asked by a nonprofit organization that supports women entering and reentering the workforce to deliver a talk for their clients on the topic, "Healthy Aging for Women." This was part of a yearlong "Love Your Body" campaign. A couple of weeks before the presentation, the organizer sent me a prepared slide deck on the topic. "Here's a PowerPoint you can use for your talk," she explained. The presentation was packed with all kinds of scary statistics: leading causes of death, number of older women living with a chronic condition, number of older women with skin disorders, number of older women who are depressed. The slides continued with an array of all kinds of terrible things to expect with aging: hardening arteries, creaky joints, saggy skin and lots of wrinkles, liver spots, shrinking bone structure, impaired memory. Ugh! The underlying message was, "Shoot me now!" Finally, at the very end, after a download of demoralizing data, the presentation issued a call to action: "Make the right choices."

Just reading through the slides was enough to make me feel like *I* needed a drink. The presentation painted a bleak future; it certainly didn't motivate me to "make the right choices." This slide deck was not prepared by agents of change; it was prepared by agents of terror!

A lunch 'n' learn done well, on the other hand, *can* inspire change and pave the way for a mini-movement. In one case, I delivered a lunch 'n' learn for a large insurance company that was in the beginning stages of launching a wellness program. Before my talk, the wellness coordinator confessed that she was having difficulty recruiting employees to join the newly formed wellness committee. Only three had volunteered up to that point. During my ensuing talk, I issued a call to act: Join the wellness committee. One week later, the wellness coordinator called to tell me that 26 had committed to join!

Recently, I delivered a lunch ‘n’ learn called “Please, *Don’t* Have a Seat!” at the Kimpton Hotels & Restaurants headquarters. Following the presentation, an inspired participant, Whitney Smith, created her own makeshift standing workstation in the middle of the common area. When curious coworkers asked why, she shared, “I just learned about the benefits of sitting less, so I’m standing more and already feel a lot better!” Her bold mini-movement is now inspiring others to get out of their chairs and build their own standing workstations.

Your goal is to move people, and there’s nothing wrong with explicitly calling this out. In fact, I often start my lunch ‘n’ learns with the advice: “What I say doesn’t matter. All that matters is what you actually *do* when you walk out the door at the end of the session.” Inspire and give people the tools to engage with the movement once they walk out the door. This means delivering key calls to action, crafting a message, and delivering it in a way that’s emotionally compelling.

To reinforce this call to act, I usually end my lunch ‘n’ learns with a reminder that each of us can be an agent of change, and in fact, we already are. Every one of us is part of a social network, and within this network, every personal choice we make can spark a social contagion effect, or ripple effect. Our habits influence our friends, our friends’ friends, and even our friends’ friends’ friends!<sup>23</sup>

To bring meaning to this phenomenon, I often ask participants to recall Kennedy’s speech in which he urged us to “ask not what your country can do for you—ask what you can do for your country.” One of the very best things that each of us can do, I tell my listeners, for ourselves, our friends, our families, our coworkers, our communities, our country, and even for our world, is to begin with ourselves and simply make better choices. In issuing this reminder, I am asking each of the participants to join me in “being the change” to change the world, one mini-movement at a time.

## **SIMPLE TIPS TO BUILD A BETTER LUNCH ‘N’ LEARN:**

1. **Create an emotional experience.** It’s always much more powerful to open with an emotional hook—a story, a video

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clip, even a movement-based or interactive activity—that builds empathy and emotional engagement.

2. **Less is more.** Remember that your goal is to inspire people to take action. The point is not to deliver a boring health lesson, with lots of frightening facts and boring statistics. Don't go overboard on data, or you will quickly lose your audience.
3. **Issue a call to act.** I'm always surprised at how long it often takes lunch 'n' learn speakers to get to the point. Many times, they wallow in information overload. Don't make that mistake. Issue the call to act right away, frame it in language that inspires action, and repeat it throughout the lunch 'n' learn. Just like your goal is to be an agent of change, encourage participants to also feel empowered as agents of change.
4. **Encourage social activism.** It's helpful to use titles like "Stand Up for Being the Change." Remind participants that their personal choices are actually not so personal. For some people, investing in their health and well-being feels selfish. Remind them that it's just the opposite. Behaviors spread like viruses through social networks, so every time we make a positive choice, we're positively influencing the choices of friends, friends' friends, and even friends' friends' friends.
5. **Give them something to do.** Less information means more time for interaction. If you want to increase the likelihood of generating change, you need to create more opportunities for participants to make sense of the material on their own terms. This means less lecturing and more doing. Provide time for participants to draw from their own experiences and their own knowledge base through small group work.
6. **Be a coach.** Step out of trying to be the expert and source of all information. Think more about *facilitating* a learning process. A great coach is someone who not only delivers information, but also creates emotional hooks to motivate and

inspire. This means asking more questions and encouraging participants to learn from one another and from themselves, not only from you.

## FINAL THOUGHTS

Being an agent of change is not just about delivering information and demonstrating expertise; it's about moving people and giving them the tools to transform themselves. While you certainly want to get up to speed on the latest research and best practices in the field of workplace wellness, you also want to think about how you can adopt the elements of a changemaker. Beginning with your personal why, your task is to courageously move forward with sparking a movement of well-being within your organization. Stories and emotional connections are what will lend persuasion to your call to action.

