

# The Birkman & Me

by Perry H. E. Carrison

“**Y**ou can do it! Jump!” I yelled up at the quivering, two hundred pound man, CFO and organizational disciplinarian for a major US manufacturer. He sat perched on what looked like a postage stamp: a two-foot platform, forty feet up a ramrod straight pine tree by the side of a black-water pond. “It’s safe! You’re not going to fall! Think ‘Sail’...and push off!”

“I cannnnnn’t!” his voice came down, muffled but definite. Squenched knees wrapped under the tiny, plywood platform like a clothes pin. Bill, the CFO, grasped the rope that was clipped into his harness as if his hold on it mattered. In reality, the secured carabineers clipped into his harness assured his complete safety – and established the redundancy of his blanched fingers pinched around the rope. Before Bill had ever lifted his body onto the first steel, staple-step on the pine tree, we’d fastened him into the whole rig...he could have fainted and his immediate future would have remained essentially the same. Which was? Bill and his team of executive peers were working their way through a series of “challenges” on a ropes course. They’d bought into my philosophy about experiential learning—using physical challenges as a means to create living metaphors for better leadership behaviors back at work. To that end, Bill was perched on the take-off platform of a Zip Line, a mostly fun challenge, once you dealt with your fear of heights. Of all the ‘elements’ on my course, I knew this to be one of the most potent as a carry-home. Women and men used their courageous plunge onto the Zip Line like a ready Brave Pill when they had to face scary issues at work. It had helped many others...and it was very likely that it would help Bill. He’d jump and careen on the singing pulley across the half-inch thick cable stretched from mid-pond island to mainland. The daredevil ride above the water would come to a safe landing, lobbing Bill into his team’s outstretched arms like a slow-motion bullet on the other side.

“Bill...let’s talk a minute. First of all, you can come down,” I yelled up at him. If Bill was going to get some learning from this, he had to feel responsible. He had to know he was at choice.

“I can come down?” Bill clearly had envisioned *me* as the responsible party. The idea of choice was a ‘peach blossom in a snow storm’ anomaly he’d never expected.

## The Birkman & Me

“Sure you can...” I assured him. “This isn’t the Marines and you’re not being graded.” Bill’s body language gave me an immediate response...he unfolded. Rigid arms and squeezed legs all suddenly breathed. He didn’t have to say anything. Considering the possibility of coming down, Bill gave the staple-steps that ran back down the tree to the ground a long, assessing look. “Here’s a way to see the choice, Bill. It’s a win, either way. One way you could play this out is to make a choice that is far less guaranteed to get approval: you can come down the ladder, and be proud of the fact that you made the right choice for yourself, no matter what others think. That’s very powerful.” I said. “Or, you can take a different approach and jump through the fears that seem to be holding you back. Another powerful choice. Either way, you have my respect.”

What had come over me? How did I know to guide Bill’s dilemma into a win-win? I wish that I could claim omniscience. That certain *je ne sais quoi* that makes me the most astute facilitator in the world. But it would be a complete lie. The truth was this: I had insider information. My partner had introduced me to a personality assessment that was so insightful, so reliable and so astute about a person’s needs that it made my facilitation job a cake walk. Or, almost one. Bill and his peers had all taken The Birkman Method Assessment before they’d come to our facility. We’d spent the previous day going over the results. What I’d seen – and what Bill had agreed to about himself – was his intense need to be seen in a positive light; respected by those who mattered to him in his life. Clearly, he was grappling with that inherent need now. The miserable, self-conscious bind he was in had cinched him to the mast like a tortured pirate. He was paralyzed by feelings of shame for not being “manly” before his peers...yet was prevented from performing by his over-riding fear. Less dramatic versions of this situation were probably happening to Bill back at the office. Here was our chance to give him a credible alternative. Bill seemed to be at a very different level of the process now, thanks to the Birkman.

“Either way, eh?” Bill asked me, somewhat rhetorically.

“Yep. Either way, Bill. Just do what’s right for you. Either way you’re taking home the trophy.” I felt like the camp counselor I’d always wanted: one who could honestly validate what I was going through. Not sugar coat; not infantilize...that just made me feel weaker. But one who affirmed me, as I confidently did for Bill in his ‘learning’ moment.

## The Birkman & Me

A minute ticked past. Then two. My neck was sore from looking up the tree. Bill was now dangling his legs, sitting like the owner of his perch instead of its prisoner. One hand was on the rope; the other leaned on the platform at a slight angle, behind him. Six men and two women stood silently focused on Bill from the safety of the far side. All were curious to see the vulnerable moment play out with a man whose strong reactions to perceived slights had affected them all. I, too, wondered what conversation was going on inside Bill's mind. Silence is a malleable picture.

Bill shifted above me. His right hand, the one that had been supporting him, came up in a swift move and grasped the harness rope in front of him. Now, both hands held it. At the same time, I could see that his legs were, again, pinching up under the platform. He unched his behind a bit closer to the edge...then called out to the assembled below him and across the water. His voice sounded more like a St. Bernard's than the Chihuahua's whine he had earlier.

"Yeah! OK! So here's where I'm at. Thanks for waiting. I'm scared. I'm scared of jumping. And I'm scared of looking stupid." Bill's voice stayed strong and clear as he disclosed his state of mind. All of us hearing him were predictably rapt. "But I know that if I was down there looking up at my son sitting here, I'd love him either way. I'd just want him to do what he wanted to do...no questions asked."

He unched closer to the edge, cocking his body like an Olympic track runner, jamming his foot against the jettison prop behind him.

"What I want to do right now...is.....to...FLY!!!!" Bill sang out like an adrenaline-crazed fraternity boy, cannonball splashing into the empty air surrounding him. The pulley zinged down the cable with ear-shattering fury under Bill's weight, its rollers whining and crying, while Bill rode it like a Zen hood ornament, face beaming into the wind.

Whoops and arms blanketed Bill as they braked into him into a landing. Once again, Birkman and the Ropes had added value to another organization's life.

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## The Birkman & Me

Stolid CFO's careening across ponds on a pulley? What's that about?

Personality assessments taking up hours of incalculably valuable senior executive think time? Could it possibly be worth it?

How did our forbearers' labors at the anvil and in the fields morph into psychology classes for workers that take place in tree tops?

The quick answer is evolution. But what's that? You can't see it...the progress is too incremental. Besides, does it mean you have to accept the Big Bang theory to even begin understanding it? And does the human story actually change over time?

David Whyte wrote an important book for many consultants in 1989 entitled *The Heart Aroused*. In it, he used ancient myths that tell the story of the human race to make a case for the historical and ongoing synergy between Artists and Patrons. From Michelangelo and his Pope to Haydn and the Esterhazy's, Whyte pointed out that each population (Artists who create and Patrons who buy their creations) needs the other. As a poet who works as a guide and coach for executives trying to gain a clearer perspective on their contribution to their businesses, Whyte theorized that he was simply the modern version of an Artist (a consultant) allied to his Patron (business). Just as in earlier centuries, the two benefited from their union.

A similar alignment exists between business and psychology. In fact, it's the same union. Like Right Brain/Left Brain or A & B Personality Types, businesses must understand what makes people tick. Its engine *is* people, there's no getting around it. Similarly, those who study behavior often focus on people at work because it is a reliable and dynamic 'people laboratory'.

Roger Birkman is an industrial psychologist who has made his life about understanding people in business. Back in the 1950's when Peter Drucker was just beginning to craft the fundamentals of management that would impact business the way electricity ignited machinery, Birkman saw that business could be the focal point of his idealistic mission. As a bomber pilot in WWII, he lived through the effects of one man's judgment against a group of people. And he made a commitment to do everything he could to create an alternative to that kind of judgment. His genius was in seeing more than the specific devastation of the holocaust. He looked at what drove that war and generalized. His

## The Birkman & Me

deduction was that everyone judged everyone else and when they did, they used their own inner sense of ‘normal’ as a yard stick. Birkman knew that yard stick was faulty—one person’s ‘normal’ is not another’s—when applied to others, but what was the alternative? Though religions preached equality, many people either weren’t religious, or they could not link the philosophy of equality with their day-to-day life. What people needed was a logical bridge that helped them get a sense of what other folks were like without using any one person’s subjective experience as the Rosetta Stone.

Psychology was young in the 1950’s, and the emerging field was boundless with possibility. Roger Birkman used the GI Bill to enroll in an Industrial Psychology graduate program. He’d landed on the idea of creating a psychological assessment that would describe behavior (behavior being a reliable indicator of our inner state of mind) as a function of met or unmet Needs. In fact, he posited that behaviors were accurate measures of Needs—Needs we fulfilled and Needs we often times didn’t fulfill. Like the human body that can function productively when it fills its Need for food (or functions ineffectively when it doesn’t), Birkman saw our psychological bodies acting much the same way. It had Needs that didn’t show, but were undeniably present. Through studying people day after day, he began to see them from a perspective that simplified their actions. Aided by a set of descriptors called The Big Five which named the most prominent characteristics of human motivation, Birkman formulated his Questionnaire. He polled people about how they saw others, knowing that those opinions would echo each person’s understanding of themselves. That is, if you’ve missed your last two meals and are sitting in a meeting, it’s likely that you’ll be hungry and imagine other people as being hungry as well. It’s an extrapolation of the well respected axiom “projection makes perception.”

Six years later, Birkman graduated with his Questionnaire, his initial findings, and a powerful enthusiasm grown from the fledgling possibility that he could meet his ideal. It was an enthusiasm he would need in boundless supply. Unlike today’s curious culture that will consider any assessment they run across in a periodical, Texans in the 1950’s would not. Then, no one would have described the maverick culture of ‘the Republic of Texas’ as introspective. Still, Roger knocked on the doors of businesses, churches, schools and prisons, inviting them all to discover which psychological levers were being pulled by their

## The Birkman & Me

peers and cohorts in their every day interactions...and why they reacted as they did. He and his wife, Sue, were like traveling singers, begging radio stations to play their new songs. Like those singers, they knew that the key would be their ability to persevere. Thousands of miles and thousands of respondents later, the Birkman's had built a scientifically robust database. Their backroom of graduate students in Houston then worked with the National Science Foundation to determine the statistical reliability of their method. Business journals and newspapers began to notice. Today, with 50 years of continuous research and endless testimonials of appreciation from organizations of all sizes and endeavors, The Birkman Method has brought Roger Birkman's vision to life. He created a tool that gives people an easy-to-use, non-judgmental perspective on themselves and on others.

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“Hello, JoAnn?” I queried into the telephone. “Have I got you?”

The voice that came back was quiet and reserved, “Yes.” Ooooh. She sounded flat and without affect. I was, in the same moment, both crestfallen and determined. Meeting new clients over the telephone for me is about 90% intuitive ping-pong, 10% bold bluster. I try to assess their need, respond to it in a collaborative way and lead the conversation through the choppy seas of initial contact.

“I know that my secretary set this time up as one that worked with your schedule...does it still? Do you still have about ninety minutes to go over your Birkman results?” ‘Assume nothing’, I said to myself, including the fact that I knew why JoAnn sounds so reserved! I had no idea why.

“It's still fine, thanks. Ah-huh,” she confirmed. I could push forward. JoAnn had filled out the Birkman Method questionnaire a week earlier and it had been processed. My office had sent the results to her office in Monterey, Mexico. I'd been hired by her new partners in a consulting practice to interpret JoAnn's scores. Later, I would advise them on their chemistry, as viewed by their aggregate Birkman results. JoAnn had an advanced degree in Organizational Development so (I thought) she wasn't a newcomer to assessments. This could mean that the process of winning her trust would be more difficult. Someone new to hearing themselves described as if they were a commodity is often delighted with the insights

## The Birkman & Me

provided by the tool. Veterans are often more reserved as they test the results for inconsistencies. Eighteen years of practice gave me confidence that I could give her a useful interpretation.

“JoAnn, I know very little about you from your new partners. We’re about to embark on an in-depth discussion about you...Can I suggest that you’d find it more useful if I’m able to apply those results to what’s actually taken place in your life instead of simply giving you canned examples?” I wished I could see her face. The telephone was so blank! Face to face meetings were fluid and easy -- but the phone was a lifeless doll when trying to gauge reactions and respond to them. Only my trust that the Birkman would be useful to JoAnn pushed me forward.

“What would you like to know?” she countered.

“Honestly?” I hedged a little. “I’d like to know whatever you’re comfortable telling me. Who was your birth family composed of? Where did you grow up? What was school like for you? Did you go directly to college? What did you take? It’s all relevant.” Face to face, I simply ask the person to tell me the story of their life and I give them an hour to do so. It’s fascinating to me (and often very helpful to them) to hear their life told as a story. We almost always bond, even though all I do is listen. Years of these meetings have taught me that listening is usually the most important aspect of the entire session. The experience of feeling truly heard by another can do what assessments can only support. That knowledge emboldened me to ask strangers to talk to me about themselves.

And it worked with JoAnn. She warmed to herself as a subject, not sharing the family secrets but telling me important facts that would be useful as we tried to understand why her Birkman scores calibrated as they did. As with most people, JoAnn told stories that seemed unremarkable to her – yet, to an outsider hearing it for the first time, they sounded heroic. Like her decision to go out on her own as a consultant in the same year that her sister died and her marriage ended. I knew that kind of courageous act would daunt most of us...yet to her, it was completely natural. As she talked, I scanned the scores on her Birkman summary report.

The way the Birkman illustrates its understandings of a person is through an invented—but easy to understand—description. First, it “pretends” that a personality can be categorized into eleven different areas (an extension of Dr. Birkman’s original use of The Big



## The Birkman & Me

something! And if I substitute the word “independence” for the Component name of Freedom, you’d get the picture, right?” We both laughed.

The gift of the Birkman isn’t that it tells people something new about themselves. Rather, the gift is that it tells them what they already know but without judgment. Not the judgments of their culture; not the judgments of their parent and grandparents; not the judgments of their heroes. Through years of refinement, Birkman has found ways to describe personality without bias. And in so doing, make it possible for people to accept themselves. For instance, Authority is an aspect of everyone’s life. We are all in some type of relationship with it. We have opinions about people who dominate. We have opinions about people who’re reserved and ‘won’t fight back’ or debate issues. Yet, when we try to examine ourselves in the Authority mirror (wondering “where am I in terms of Authority?), it’s almost impossible to get an accurate picture. Birkman is able to take hold of such a basic building block of personality and refract it through its prism of non-judgmental opinion. On its scales, behavior that’s allied with Authority is described on one end of the scale as being “productively confrontational”. Those who have the complement of that behavior are described as being “suggestive and persuasive”. There’s no statement at this point about whether or not these people match each other’s needs. It’s just a statement of a person’s individual strength.

When measuring someone’s needs in the same component (Authority), Birkman tells of a need for “discussion and debate as well as a need to respect authorities” in that person’s life; or, the complement as someone with a need for “non-confrontational and genial relationships” in order to feel at ease.

Caramba! With those concise, descriptive words, the Birkman has addressed one of the most radioactive elements of relationship: dominance & confrontation. Do we or don’t we? Whichever it is, we know it. Either we’ve been maligned for being bossy or we’ve been described as too easy-going. Often, the way it comes out in a relationships sounds like “Dave is so easy to get along with – he’s never ill-tempered!” (Low Authority); Or, “Invite Hank to the meeting. We need somebody to hold our feet to the fire!” (High Authority). What’s often difficult is a scenario in which Dave and Hank have to work together and they don’t meet each other’s needs. Yet, they don’t have the language to address their differences in a way that they trust will work out for the better. So they avoid their differences...usually, to

## The Birkman & Me

painful consequences. When major players have moats around certain relationship issues, emotional crocodiles threaten anyone who approaches.

JoAnn and I continued on the phone for the next hour and a half, going over her scores. By the time we'd gotten to the final Component, we'd exchanged enough information and life stories to have an easy flow with each other. Was she a Birkman convert? I didn't know. But I felt secure that she trusted it enough to participate in a group session – one in which I'd help the three new partners have a frank and enlightened discussion about their chemistry as colleagues.

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Dale Turner rooted in her pocketbook for a mint to fix her coffee breath. I could hear the jumble of keys and tin as she dug, finger-reading the Braille of familiar shapes hiding in the confines of her bag. “Let me find this daggoned breath thing so I don't knock over the security guard going back in.” She kept digging, absent-mindedly frowning at me. We'd retreated to Starbucks for a talk. Dale worked at Denver's most prestigious hotel but her office had ‘junior’ office walls that left two feet of space open near the ceiling. To us, that ended the possibility of a private conversation. Halfway through our mocha's, another duo from the hotel took an empty table beside us. That ended our privacy there as well. She pulled out the Victorian tin of mints and popped three tablets into her mouth, pulverizing them with grinding chews. “Now I'm ready!” Dale got up and scraped her chair, jarring every conversation in the room. She threw her coat around her shoulders and walked towards the door.

“Conference room?” I asked, sinking my spent cup into the waste bin.

“Where else?” she said. The glance told me what she thought of meeting there. It's what we all thought. Though the hotel got five stars for its treatment of guests, those of us who worked in its hidden administrative offices gave it two. Especially when we had to use the “historic” conference room...the one Buffalo Bill was supposed to have used when he signed Annie Oakley and Sitting Bull to his Wild West Show. Preservationists had pleaded with the hotel owners to bar the 21<sup>st</sup> century from this room -- which they agreed to, as long as it could continue to function as a meeting space.

## The Birkman & Me

Dale Turner's role was Senior Vice President of Customer Relations. I was meeting with her in my capacity as her team's coach. Six months ago, her CEO, Bill Franken, had hired me to 'fix' his Executive Team. Bill was popular and effective – but hard to know. Always smiling, always moving, Bill listened to his senior officers like a man watching a basketball game. His attention seemed to lick out and snap facts out of the air as he multi-tasked, phone-to-computer-screen-to-intercom-to-cell. As a boss, his direct reports loved him because he got things done. Person-to-person, they were ill-at-ease with him. My willingness to listen cast me in a role reminiscent of a padre in a jailhouse. I was a popular resource. On my monthly visits, I met with each of his corporate officers to take a pulse on how folks were feeling. Emotional Intelligence varied on the team but even the ones who didn't have much of it felt the effect when their emotional kilter was off.

“That man hasn't even walked into my department,” Dale wailed and smacked the table. “Why did I move here and take this job if he didn't want me doing it?” Although we'd met only a few times before, Dale didn't hold back. From last month and the one before, I'd become educated about her life, professionally and personally. She didn't have a relaxing moment in either. Besides the disconnect with her boss, she was also struggling with an alcoholic husband. She told me that every night, she faced a man who sat like an upright cadaver in their living room drinking beer to the serenade of laugh-track television. She was angry that her boss, Franken, was giving her the same m.o. “We've taken the department my predecessor left—if you want to call that street bizarre a department—and built a foundation that's going to get this place in The Wall Street Journal. The least he could do is come by and slap a few backs!” Dale had a passionate nature. Just now, that nature was scorched and smoking earth.

“Dale...” I tested, wondering if it was time for me to talk.

“Yeah?” she came back, frowning.

“How long's that been building up?” I asked.

“What? How long's what been building up?” Dale locked her eyes on mine while her hands shuffled and stacked papers in front of her.

“Come on, now,” I cajoled back. “You know lava like that doesn't make in a day.”

“Lava?” she fumed. “Lava??”

## The Birkman & Me

“Dale! Easy! Easy! I’m here for you. Remember?” Honestly, I didn’t mind Dale’s anger. After years of trying to get corporate officers to speak their truth, some honest outrage was welcome. But I had to keep her on track. That meant moving the energy of her boundless anger into a workable strategy with her CEO.

Dale kept her eyes on me. Suddenly, like someone letting go with a violent sneeze, she whipped her head away and threw a stack of dog-eared files to the floor. Her rigid-with-anger body let go. Her body fell into the chair like a heavy cape dropped by someone in a hurry. “I just get so hurt with him,” Dale put her right hand to her face and flicked away a tear.

“It’s tough, Dale,” I said, “But you knew it would be when you came here...I know they told you how he was....right?”

“None of the stuff they said got past my ears...All I could hear was the headlines. ‘He’s great with people.’ ‘You feel like his best friend.’ I didn’t hear anybody say he had the compassion of a parking meter.” She paused. “I get it now, you better believe.” She was beyond her tempest. Maybe now would be a good time to shift our talk...

“How about a Birkman moment, Dale?” I asked her. It was just this kind of intense situation that could be the most powerful classroom. If I could get her—even slightly—into the ‘Observer’ perspective by using the Birkman, she’d likely remember how to free herself from the flypaper of her reaction.

“Well, there’s always THAT!” She huffed back at me in a little cartoon of mock contempt.

“Yep. Always...my favorite learning language for what’s already in play,” I reminded her. “Can you pull away enough from the content to tell me which Component of yours would describe the last few minutes...Components. You know...like Esteem, Acceptance...?”

Dale looked up at the ceiling. “Yeah, yeah, I remember,” she told me. I could see her shifting through memory files as if they were stacks of bookkeeping reports. Then, “Ah! I’ve got it!” she turned to me with her face lifted up. “Empathy! We saw my Empathy! I need to blast my emotions to someone who gets me!”

“Couldn’t have said it better...That’s definitely how I would peg it. Bonus Question...” I edged her in further. “What else? You’re right about the need to express

## The Birkman & Me

passionate feelings. Seems to me that another Component is at play.” I wondered if I would have to give her a clue.

“OK.OK,” Dale played along. “I’ll get it. You always talk to me about two of these things...they’re the ones that get me into trouble.” She rolled her eyes around the room and bit her lip. “Dern you!” Dale actually enjoyed the Birkman because of the relief it gave her. Naming a feeling or potent experience is often tantamount to solving any problem related to it. “I’ve got it. I know!!” she yelled louder. “It’s that Authority thing! Ah....ah....I’m confrontational! I get in your face. I yell out!” Dale looked like a third grade kid doing ‘show and tell with a live beetle in her hand. “It’s that thing you always say. You know...I’m a Flamenco Dancer. That High Authority and High Empathy hooked up together and Pow! I get passionate!”

It was hard to believe her shift. Ten minutes earlier, she’d been a furious and overwhelmed mess; now she was an empowered and proud-of-herself player. If I could have filmed her shifts, I would never have had to explain the difference between the two behavior states that Birkman talked about again. In one, we react to not having needs met and have behavior that shows our frustration. In the other, like Dale, once we’ve vented and met a profound need for feeling understood (as she correctly named ‘her Empathy’), a different person emerges, able to communicate with ease. Better examples of Empathy and Authority didn’t exist. Birkman’s ingenious language had proved itself again.

Now that Dale and I had defined what was up, we could discuss next steps.

“That’s you, for sure, Dale. Flamenco in a fury,” I teased her. “What are we going to do about it? You want your boss’s support now, before the Customer Service department is the star department it’s bound to become. How’re you going to get that to happen?”

“Maybe a better question is ‘Why haven’t I gotten it from him yet?’” she countered.

I sat back in my chair and looked out past the brocade blinds. Dale was quick. The best thing for me to do now was just sit back and listen.

“May be,” I said. “That absolutely may be the right question.”

“I’d say I haven’t gotten it because I haven’t asked him. I haven’t asked him, and he doesn’t see it. Right now, what he sees is a big red debit. I’m a money drain until we’re up and running. I bet he looks at me and thinks, ‘Well...when!?’ And even though that’s right in a way, I could have made it different between us. I’m beatin’ myself to death trying to get

## The Birkman & Me

this thing done but I don't do a thing to make him a part of it." She seemed to have it sorted out. "My thing with Authority makes it hard to look needy in front of my boss. I'm supposed to be able to do everything myself."

"Can't ask for help from your boss. Or anyone else." I said.

"Funny thing about being in a position now where I have to – ask for help, that is. Wasn't that on my Development Plan? Asking for help? That's that Birkman thing again...the one about doing it all...."

"Yep. What is it?"

"Oh, I knowwww," she gave me an exasperated look. "Hint...?" Dale cut her eyes over at me.

"Ego needs..."

It dawned: "Challenge!"

Our session ended with a role play session so Dale could practice asking her boss for his support. Did she change? Fundamentally, no. She did not. She was still the driven, passionate executive when she left as she was when she came in. However, understanding her part in influencing relationships had given her relief that was unavailable to her before we applied the Birkman's language. Now, she could grasp which appropriate actions she could use to reach a destination other than debilitating frustration.

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For most of us, human relations will never be easy. Individuals are complex. Groups of individuals adds an exponent to that complexity. Even so, what choice do we have but to attempt to understand why we behave as we do? The Birkman Method approaches people with two powerful keys. One is its insight into the complex world of motivation and behavior. The other is its non-judgmental perspective. Though learning the language is a chore, it's a chore that, when completed, truly adds to the quality of life of those it touches.