

# ESCAPE FROM EXCELLENCE

HOW TO OVERCOME THE LARGEST HIDDEN COST  
IN BUSINESS AND EXPERIENCE EXPONENTIAL  
CHANGE AND REWARDS

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## ACKNOWLEDGEMENTS AND CREDITS

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*Feel free to post this e-book on your Blog, to e-mail this e-Book to anyone who you think might benefit from it, and to reference or quote it in media. Thank you.*

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## CHARISM

Charism Advisors partners with senior leaders and organizations to escape the Excellence Trap and achieve Leadership Mastery. The difference is qualitative and unprecedented, and creates exponential increases in vision, alignment, capacity, innovation, returns and rewards.

We are the first to discover and diagnose the Excellence Trap, the largest hidden cost in business.

We are also the first to create a path to Mastery specifically for business leaders. Unlike great athletes, performers, warriors, and sages, business leaders have never had a workable and pragmatic path to Mastery. We've changed that. And changing this changes everything.

In all areas, Mastery has always been by invitation only. It is offered only to those who have already reached a high degree of excellence, and are now paying the price even more than they are reaping the rewards. If this is you, consider yourself invited.

In this e-book, we'll share how we discovered the Excellence Trap, and what you can do both to escape from excellence and to shift to Leadership Mastery (and to Enterprise Mastery and Market Mastery). We've tried to add value while keeping it as brief and topline as possible, so if you want more information or have questions, check us out [online](#), [contact us](#), or read our [Blog](#) to get more detail. Or hire us to get access to our tools, our minds, and our support.

# CONTENTS

5	THE PREMISE, THE PROMISE
6	THE CATCH, THE BREAKTHROUGH
7	<b>PART ONE: THE SITUATION</b>
8	UNCOVERING & OVERCOMING THE LARGEST HIDDEN COST IN BUSINESS
9	WELCOME TO THE EXCELLENCE TRAP
10	EXCELLENCE IS NOT SUSTAINABLE. MASTERY IS.
11	BUSINESS LEADERS HAVE BEEN POORLY SERVED
12	THE COSTS, LIMITATIONS AND CHALLENGES OF FAILURE, MEDIOCRACY AND EXCELLENCE
13	THE COST / REWARD RATIO
14	HOW EXCELLENCE TRAPS US
15	<b>PART TWO: THE EXCELLENCE TRAP</b>
16	FIVE VIRTUES & LIMITS OF EXCELLENCE
17	THE FALLING POINT
18	FIVE CORRUPTIONS OF EXCELLENCE
19	FIVE COSTS OF EXCELLENCE
20	FIVE FAILED STRATEGIES OF EXCELLENCE
21	<b>PART THREE: LEADERSHIP MASTERY</b>
22	WELCOME TO LEADERSHIP MASTERY
23	FIVE MARKERS OF MASTERY
24	FIVE PILLARS OF MASTERY
25	FIVE SHIFTS TO MASTERY
26	FIVE OUTCOMES OF MASTERY
27	FIVE REWARDS OF MASTERY
28	SUMMARY
29	<b>PART FOUR: HOW TO BECOME A LEADERSHIP MASTER</b>
30	THE PROCESS
31	THE CHARISM DEVELOPMENT MODEL
32	ABOUT DYNAMIC ESSENCE
33	THE STRATEGIC VALUE OF DYNAMIC ESSENCE
34	THE ROLE AND CHALLENGE OF LEADERSHIP
35	<b>PART FIVE: ENTERPRISE MASTERY &amp; MARKET MASTERY</b>
36	ENTERPRISE MASTERY
37	MARKET MASTERY
38	MARKET MASTERY METHODS
39	<b>PART SIX: THE WRAP</b>
40	WISDOM FROM THE MASTERS
41	FINALE
42	PREDICTION/INVITATION
43	OUR WORK
44	ABOUT THE AUTHOR

# ESCAPE FROM EXCELLENCE

ALL MEAT, NO FILLER. ALL FIBER, NO FAT.

## THE PREMISE

If you have pursued and achieved excellence, all your hard work isn't paying off like it should, or like it could. This is because **EXCELLENCE IS A TRAP**. It is nothing less than the *largest hidden cost in business*. Excellence has built-in limits that increase over time, so the more excellent we become, the higher the price we pay. And if you or your business is trapped inside excellence, you will feel its effects, but you won't know the source or the solution. It's hidden. But the hard fact is that you can't overcome these limits and costs by being even more excellent. You must escape it. And doing so changes everything.

I always thought that when I reached this job, I'd be living large. I'm operating at my best, and my people are top notch. But it often feels like pushing a boulder uphill. I can't understand why.

-- CEO, Technology

## THE PROMISE

If the Excellence Trap is the largest hidden cost in business, then **the Escape from Excellence to reach Leadership Mastery is the greatest source of competitive advantage and sustainable performance**. Mastery changes the game. As a masterful leader, you and your business will sustain peak performance, using fewer resources. What's more, your business will experience exponential rewards because mastery is not only applicable to leaders, but also teams, entire enterprises, and markets themselves. *Results start soon and last a lifetime*. Mastery is qualitatively different from excellence, meaning that it's different in kind, not in degree.

**MASTERY DRIVES EXPONENTIAL CHANGE AND DELIVERS A DRAMATIC INCREASE IN PERFORMANCE AND REWARDS.**

Leading from mastery makes all the difference. We are realizing and sustaining a level of performance that is unprecedented for us.

-- President, Financial

## THE CATCH

There's a catch. **Until now there has been no available and reliable way, designed specifically for leaders, to escape excellence and experience mastery.** Great athletes, performers, sages, and warriors have always known the distinction between excellence and mastery, and had a structured path available to leave excellence behind. Business leaders never have, and so have remained trapped.

## THE BREAKTHROUGH

**This book changes that.** We've created the *only* escape route from excellence to mastery specifically designed for leaders; addressing their challenges, using their language, and advancing their goals, while drawing from our own immersion in many of the great mastery traditions. And we are the first to make it available for business leaders in a way that works for them. We understand in detail both the dynamics and costs of excellence, as well as the structure and rewards of Leadership Mastery. **THE CHARISM MODEL OF LEADERSHIP MASTERY IS A BETTER MOUSETRAP**. See if you agree...



# THE SITUATION

Where are we and how did we get here?

# UNCOVERING AND OVERCOMING THE LARGEST HIDDEN COST IN BUSINESS

**WE HAD A FEW QUESTIONS.** After working in business for twenty years, consulting to many industry leaders, we asked, “Why is it that so many intelligent, ambitious, educated, hard-working, experienced, and capable people, with a track record of success, continue to struggle to achieve and sustain that extra five percent that defines greatness? Why are they working hard to achieve more than merely incremental change and marginal results, more than a narrow competitive advantage? Why do we see everywhere the struggle to sustain innovation and output, to keep motivation and morale high, to communicate effectively, to keep it fun, to make a difference, to leave a legacy, to succeed, to find the zone, to keep the ideas coming? Why do we see leaders and organizations struggling with depletion, unsustainability, destructive politics, stress, turbo-tasking, groupthink, useless meetings, infrequent breakthrough innovation, burn out, and lack of balance? And, crucially, **why do we see this even among the very best, among the people who have done everything right?**”

Then we asked, “How can it be that so many successful people and businesses usually either just complain about or accept so many unreasonable performance and personal sacrifices, tradeoffs, and compromises? Is this really just the way things are?”

Lastly, we asked, “Why is it that an army of consultants and experts in leadership, change, and performance aren’t changing the game? Why is their influence and impact apparently so small? Have they really achieved so little?”

**WHY ARE EXCELLENT PEOPLE AND ORGANIZATIONS NOT EFFORTLESSLY PERFORMING AT THEIR PEAK?**



## WELCOME TO THE EXCELLENCE TRAP!

So let's get this straight:

**TALENTED PEOPLE + HARD WORK + SUPERB CREDENTIAL +  
GREAT EXPERIENCE + EXPERTS = WHAT?**

Can this all really only add up to the marginal change, incremental growth, and ongoing struggle we see almost everywhere and everyday?

These are bad numbers, and the reason is this: **EXCELLENCE IS A TRAP**, and the driver of **the largest hidden cost in business and in life**. Excellence saps our resources and imposes a ceiling on our achievements.

Why? Because *excellence has built-in dynamics that ultimately limit us and defeat us*. Excellence only looks good in comparison to failure and mediocrity. But the irony is that you have to be excellent to get trapped in excellence in the first place. And this is the biggest gotcha: excellence is the greatest cost in business.

# EXCELLENCE IS NOT SUSTAINABLE. MASTERY IS.

We all know that excellence is necessary in order to do anything well. It has *virtues* to be sure, but it also has inevitable *costs* that undermine our performance and rewards. We'll discuss all of this in detail.

But first, **LET'S LOOK AT MASTERY** from 3,000 feet. Here are just a few examples: Tiger Woods, Michael Jordan, Lance Armstrong, Picasso, Coltrane, Dylan, Hendrix, Clapton, George Washington, Gandhi, Dr. King, and Einstein. They perform at an incredible level, day in and day out, making it look easy, overcoming personal circumstances and challenges, and doing it all with grace and style, even while remaining imperfect human beings. They make an enormous contribution and have had an immense impact on those who behold them or come into their orbit.

We see masters all the time, inspiring us and setting the standard, but they are little understood. Often we act as if they are endowed with some super-human degree of talent not available to the rest of us. Historically, they've been given names like hero or wizard. More recently, we hear people say that they went to crossroads and made a deal, or we imagine them shrouded in some kind of Yoda-like mystery. But Mastery isn't like that.

**MASTERY ISN'T A MYSTERY; IT *IS* ACHIEVABLE.** And the first and defining task of mastery is to escape from excellence, hence the name of this book.

**AND WE CAN SHOW YOU HOW.**

**HOW DO WE KNOW?** *We found Mastery, the powerful alternative to the Excellence Trap, when we looked outside business.* We saw that great athletes, performers, sages, and warriors have always known all about the limits and costs of excellence. And they have also known that, as we'll see, eventually they must **make a choice: ascend to mastery, or retreat to mediocrity.**

# BUSINESS LEADERS HAVE BEEN POORLY SERVED, AND LEFT TWISTING.

Unlike great athletes, performers, sages, and warriors, **BUSINESS LEADERS HAVE NEVER HAD A CLEAR, ACCESSIBLE, AND REPLICABLE ESCAPE ROUTE FROM EXCELLENCE AND TO MASTERY.** So they've remained stuck in the Excellence Trap, riding a roller coaster, with mediocrity biting at their heels, even in the best of times, wondering why it all isn't easier, less costly, and more rewarding.

Worse, when astute excellent leaders get a sense that they are trapped in excellence and look for a way out and up, they have to look outside of business for models and tools. As a result, they are forced to: 1) Invest resources in pursuing mastery outside of business; 2) Force-fit what they learn *there* to what they need *here*; and 3) Translate foreign languages and sometimes hostile value sets to their business challenges and objectives. This serves only to deplete resources and reduce focus even more, and solves nothing.

Moreover, we've searched the world, and we haven't found anyone that unlocks and deconstructs the Excellence Trap and the shift to Leadership Mastery in as clear, logical, and constructive a way as you deserve and we think we've provided.

*One caveat:* **MASTERY HAS ALWAYS BEEN BY INVITATION ONLY!** It is only available to those who are ready to be initiated. But here's what all initiates have in common: they recognize that excellence is a trap, they are fed up with it, and ready to escape from excellence and experience mastery. No more than that, and no less. And we'll make it easy by showing you the Excellence Trap in detail, starting now...



## THE COSTS, LIMITATIONS, AND CHALLENGES OF FAILURE, MEDIOCRITY, AND EXCELLENCE.

It's excellent to be excellent, and it sure beats failure and mediocrity. We do well to achieve excellence and to demand it of others. But as the costs chart below shows, these outcomes differ in degree, not in kind. **Excellence only looks good in comparison to failure and mediocrity.**

FAILURE	MEDIOCRITY	EXCELLENCE
Limited opportunity for growth	Seek stability over growth	Struggle to maintain growth
Inaccessible resources	Reduced resources	Over-taxed resources
Lost investment	Weak return	Elusive or compensatory rewards
Defeated position	Lowered expectations	Battle with burn out
Loss of motivation	Loss of passion	Diluted direction or focus
Extreme stress	Little inspiration	High stress
Dreams, not goals	Blunted purpose	Escapist fantasies
Focus on survival	Focus on acceptance	Focus on ego rewards
Innovation is frightening	Innovation is rare	Innovation is costly and marginal

Failure and mediocrity are easy targets, but **EXCELLENCE IS THE REAL ENEMY** because it extracts high costs while falsely assuring us that all is well.

# THE COST/REWARD RATIO

A simple way to understand mastery compared to failure, mediocrity and excellence is to compare the relationship between costs and rewards among them.

	LOW REWARDS	HIGH REWARDS
LOW COSTS	MEDIOCRITY	MASTERY
HIGH COSTS	FAILURE	EXCELLENCE

As you can see, mastery is the ultimate “buy low, sell high” scenario. In mastery, we enjoy much higher rewards while incurring much lower costs.

In the Excellence Trap we may get reasonable high rewards, but less than in Mastery, and with higher costs.

Mediocrity is characterized by the miasma of low costs and low rewards, while Failure demands high costs and delivers low rewards, the worst scenario.

We’ll talk about the specific costs of excellence and the rewards of mastery in much greater detail later in this e-book.

## SO JUST HOW DOES EXCELLENCE TRAP US?

*Here's the short answer:*

The things that make us excellent, what we call the *Virtues of Excellence* (p. 16), have unavoidable, built-in limits. They are finite and can be depleted. Once we pass the point of diminishing returns, what we call *The Falling Point* (p. 17), these virtues get corrupted (p. 18) and then the *Costs of Excellence* set in with a vengeance (p. 19). This is why even the best people often struggle in ways that are both unexpected and confounding.

Most people then turn to one or more of *Five Failed Strategies* (p. 20) to address these challenges. They don't work. So we are left with three choices: 1) Live with the costs of excellence and stay in the Excellence Trap; 2) Slide into mediocrity or, in extreme cases, failure; or 3) Make the shift to Leadership Mastery. This is the choice all aspiring masters must make.

**THE GOOD NEWS IS THAT MASTERY IS ACHIEVABLE.** It has specific *Markers* (p. 23), *Pillars* (p. 24), and *Rewards* (p. 27). To reach mastery leaders, teams, organizations, and brands must identify what we call their *Dynamic Essence* (their source of power, differentiation, energy, and identity, p. 32-24), tune out all other conflicting agendas and environmental white noise, make the *Five Shifts to Mastery* (p. 25), and create specific action plans and accountability measures.

**THE EVEN BETTER NEWS IS THAT LEADERSHIP MASTERY ISN'T AN ABSOLUTE; YOU DON'T HAVE TO BE PERFECT.** As soon as you move the needle, making progress, the change is dramatic and lasting. You just have to leave excellence behind.

VIRTUES OF  
EXCELLENCE

THE  
FALLING  
POINT

FIVE FAILED STRATEGIES



# THE EXCELLENCE TRAP

How excellence turns on us and holds us back

# THE FIVE VIRTUES AND LIMITS OF EXCELLENCE

## IT'S EXCELLENT TO BE EXCELLENT.

To achieve anything of significance we must first achieve excellence in what we do. So we are right to value it, encourage it, demand it, celebrate it, and reward it. As we've said, it sure beats failure and mediocrity. All successful people consider excellence both a cost of entry and a goal.

We've identified the *Five Virtues of Excellence*. They are effort, proficiency, commitment, expertise, and acumen. **If you do these things, you will be excellent.** Each is necessary, but each is radically limited. This means that past a point, you can't get more, make more, or buy more.

Let's look a bit closer at each virtue, and at its corresponding limit.

## EFFORT

**Effort is work—pure calories in action.** It is required to achieve anything; no pain, no gain. Without effort, we remain dreamers. *But* Effort is confined to our finite, physical capacities, so it is not self-sustaining and therefore can't endure.

## PROFICIENCY

**Proficiency is an acquired capability, a specific technique or skill required to do a task well.** We develop and hone our skills in order to become excellent. But, while proficiency tells us what we allegedly *should* do, it neither identifies nor leverages what we *uniquely can* do.

## EXPERTISE

**Expertise is specialized, accrued knowledge and know-how.** It can differentiate us, but it doesn't see to the heart or to the horizon of things. Expertise has no vision.

## COMMITMENT

**Commitment is willpower, and the readiness to sacrifice in order to reach a desired outcome.** Commitment stays the course, but it has no power to guarantee success.

## ACUMEN

**Acumen is the strategic ability to make good choices in a competitive environment.** But it does not tell us goals to pursue, or why they are important; Acumen is merely tactical.

# THE FALLING POINT

When we surpass the built-in limit of any of these virtues, which inevitably occurs, we cross the **Falling Point**. When this happens, our lifelong upward arc quietly but decisively takes a new direction. **THIS IS THE GREAT IRONY OF BEING EXCELLENT; EVENTUALLY IT BITES US, AND WE DON'T KNOW WHY.** But, like a subatomic particle or a distant star, we can't see it directly; we can only "see" it by its effects. And they are many.

These effects include all the limits and costs we observe in those hard working, well-intentioned, capable, successful, and excellent people we mentioned earlier—struggling to achieve the extra 5%, trying to sustain peak performance and innovation—while simultaneously confronting merely incremental change, marginal outcomes, limited advantage, and inconsistent inspiration, focus, and alignment with values and goals.

**THE FALLING POINT IS LIKE THE POINT OF DIMINISHING RETURNS, EXCEPT THAT IT'S REALLY MORE LIKE THE POINT OF INCURRING AND ACCRUING HIDDEN AND UNNECESSARY COSTS.**

The moment we reach the Falling Point, any one of the *Corruptions of Excellence* set in, and then the *Costs* come racing in. This explains why good people aren't enjoying a life of mastery. And this is precisely what forces the choice between falling back into mediocrity vs. ascending to mastery. But most driven people just try stick it out in excellence, not knowing what hit them, until the costs become too high. In the meantime, they ride the roller coaster, play the odds, and try to beat the clock.

**But take heart, every master was there once. Then they escaped from excellence.**

*At this point you can skip ahead to Part III: Leadership Mastery, and Part IV: How to Become a Leadership Master, and beyond, but it's probably worthwhile to have a good grasp of just how excellence takes a toll on us by understanding in some detail how the Corruptions of Excellence lead to the Costs of Excellence, and what they are. So go ahead and skim the next few sections if you like. You can come back to them later.*



## ENTROPY

**Entropy occurs when the physical and mental limits of Effort are surpassed.** It signals a breakdown of the system. This can happen to a person, a team, or an entire enterprise. So an excellent person, giving his or her all, eventually hits a wall, when there's no more effort to give.

## TECHNOCRACY

**When we make Proficiency our focus, it can lead to a cult of capability, or Technocracy.** When we rely upon proficiency beyond its limit, asking it to somehow differentiate us or drive great achievement, we've asked it to do what it can't do. Excellent proficiency may look amazing to a novice, but it's not the end all. We see this in the athlete who has no grace, the virtuoso who has no taste, the prose stylist who has no ideas. They are like circus performers, and are soon forgotten.

## FIXATION

**Fixation happens when the limits of healthy Commitment are surpassed.** Eventually our priorities, strategies, and organizations become misaligned. We've all seen fixated people who like to think they are merely committed. They do a lot of damage while merely trying to be excellent.

## RIGIDITY

**When Expertise is asked to have a vision, which it lacks by definition, Rigidity sets in.** Then, what we think we know supplants what we actually see, and progress becomes marginal and incremental. We've all known people who lack "the vision thing." When something doesn't go the way they'd like, unless they have other resources, skills, and frameworks to draw upon, they often dig in their heels, becoming rigid. They confuse this with expertise, with an assist from commitment. Wrong. The virtue of excellence is corrupted into rigidity, and the cost to themselves, their team, and the enterprise is following right behind.

# THE FIVE CORRUPTIONS OF EXCELLENCE

**Here's how the corruptions work.** When the *Limits of Excellence* are reached, the *Virtues of Excellence* are transformed into these *Corruptions*. These corruptions aren't crimes; they aren't corruptions in that sense. We call them *corruptions* because, by definition, they take something good (the *Five Virtues of Excellence*) and transform them into something unhealthy and harmful. So when we cross the Falling Point and the corruptions set in, we are guilty of nothing more than pushing ourselves to be excellent. And that's something to be proud of. The problem is that **this is precisely how excellence traps us and holds us back.**

## CUNNING

**Cunning occurs when the limits of Acumen are reached and strategy is reduced to self-serving tactics.** Acumen has an attitude of openness and considers navigation a part of the strategic adventure of business and life. Cunning sets in when that attitude is lost, when facts, information, and the map grow fuzzy. Because nobody has perfect information at all times, cunning is always a temptation.

# THE FIVE COSTS OF EXCELLENCE

The *Costs of Excellence* are incurred when the *Five Limits of Excellence* are reached, the Falling Point is passed, and the *Five Corruptions* have set in. So what was a good thing has now turned bad.

What do these costs mean for you? *Lost opportunity, lost innovation, lost productivity, lost efficiency, lost legacy, and lost profit.*

It bears repeating: *Excellence is a trap, the largest hidden cost in business.*

## DEPLETION

**Excellence operates within a fixed pie and, because it demands so much effort just to maintain itself, it leaves us exhausted.** Effort eventually becomes entropy, and depletes us. This undermines both performance and sustainability.

## COMPROMISE

Here, we are not talking about the good kind of compromise, the getting to a win-win. Rather, we mean **a lowering of standards, a sacrificing of goals, and a reduction of outcomes.** More insidiously, compromise also seeks compensatory rewards, allowing an entitlement mentality to replace rewards in themselves.

## INCREMENTALISM

**Excellence settles for marginal gains and linear change.** It fails to envision possibility and realize exponential change. Because it mistakenly thinks that mastery is the pinnacle of excellence, and not something else entirely, excellence is resigned to accept incrementalism as just the way things are. That's wrong. *Every day that we accept incrementalism, we incur enormous opportunity costs.*

## MISALIGNMENT

**Excellence attempts to manage rather than create focus for conflicting agendas that share no commitment or vision.** When individuals are committed to, and even fixated upon, their own agenda, and when a true unifying vision is unavailable, alignment makes a hasty exit and misalignment takes its place. Excellent people don't wait around for orders, and they don't follow cloudy strategy and uninspiring vision; they act on their agenda, aligned or not. So misalignment remains a costly reality even and especially in excellent organizations.

## EGOISM

**Excellence invites an egoism that values everything only in reference to itself.** It confuses vision with desire; it confuses intention with will; and it confuses identity with self-image and self-worth. Ego is, along with its evil twin fear, the base source and cause of all the problems we encounter in excellence, and ironically it is in excellence that ego shows up most powerfully and destructively.

## THE FIVE FAILED STRATEGIES OF EXCELLENCE

Most people don't realize that excellence is a trap, but most do suspect that something isn't quite right. So business men and woman have developed five popular strategies to try to deal with the Excellence Trap. The problem is that they don't work. **All five strategies fail** to help us escape from excellence. In fact, they only make the situation worse because they keep us trapped longer, continuing to incur costs.

We can spend a lifetime trying to work within these failed strategies, and just send ourselves up a creek. The only way to get free from the *Costs of Excellence* is to decisively escape from excellence by making the qualitative shift to Leadership Mastery.

**Here's the good news: if you are experiencing the failure of these strategies, you're absolutely ready to escape from excellence and experience Leadership Mastery.**

### DENIAL

**Denial says "tune out."** It ignores the solid reality of the limits, corruptions, and costs incurred inside the excellence trap and merely treads water. This is the strategy of the weak.

### TOUGHNESS

**Toughness says "tough it out."** It confronts the problem rather than decisively solving it. Unlike Denial, it accepts the reality of the challenge; it just ignores its real impact. This is the strategy of the brutally foolish.

### RESIGNATION

**Resignation sees "no way out."** It accepts defeat and diverts attention away from tangible results to focus instead on future fantasies and exit strategies. This is the strategy of the defeated dreamer.

### ESCAPISM

**Escapism wants to "drop out."** It leaves the game rather than working to change it. This is the strategy of the quitter.

### BALANCE

**Balance is a "cop out."** Balance is the mother of all failed strategies, but very popular these days. If you are "seeking balance," stop now! You have been sold a bill of goods. Balance juggles everything and accomplishes nothing. It seeks to manage the situation rather than change the game. This is the strategy of the duped.

# 3 LEADERSHIP MASTERY

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# WELCOME TO LEADERSHIP MASTERY!

Right here at the start, we have *three pieces of good news*:



1. If you've decided that you have had enough of the Excellence Trap and want to escape, **YOU'VE ALREADY TAKEN THE FIRST STEP TO MASTERY**. Most people don't even get this far, and remain clueless. **Think about it:** you've avoided failure, surpassed mediocrity, achieved excellence, and awoken to the Excellence Trap. That's significant! Now things are about to get easier, and turbo-charged, at the same time.
2. **You don't have to be perfect to be in Mastery.** In fact, everyone who has ever been in mastery has retained imperfections, simply because they're human. **THE POINT ISN'T TO TRY TO BE SUPER-HUMAN.** But if you're in Mastery, it might seem that way to others.
3. **While Mastery is qualitatively different from excellence, Mastery isn't an absolute;** it can happen by degree. **ANY MOVEMENT TOWARD MASTERY LOWERS COSTS AND INCREASES PERFORMANCE AND REWARDS.** If you move the needle even a little bit, the change can be significant. This then inspires greater investment in experiencing Mastery. That's why change will be exponential, not incremental.

# THE FIVE MARKERS OF MASTERY

## FEARLESSNESS

**Masters collapse the false distinction between safety and risk.** They know that to be fearful is risky in itself. So fear never enters into the equation, only prudence. They expect success and are confident with every contingency. They aren't foolhardy; they simply know that fear is the only thing to fear.

## GRACEFULNESS

**Masters inhabit a sense of proportion, ease, wisdom, and flow.** They deliver big results, accompanied by the intangibles that inspire their followers and confound their competition. Their performance is awesome: both the results they deliver but also the actual sight of them doing it inspires emulation and delight.

## GENERATIVENESS

**Masters are always creating, always ideating.** It is simply the way they think and the way they act. If they are awake, they are innovating. This isn't merely the gratuitous what-if and why-not of out-sized ego. It's more than that; masters simply cannot *not* create.

## EFFORTLESSNESS

**Masters make it look easy.** They neither strain nor push. They just do it. They achieve peak performance with a smile, and gather rather than deplete energy as they proceed.

## INTUITIVENESS

**Masters have an uncanny ability to see the truth, sense opportunity, and make correct decisions.** It's not magic; rather it's the sum of everything they know and are, working for them behind the scenes, and even unconsciously, to do great things. It's non-linear thinking at its best, regardless of whether they are more right-brained or left-brained.

Masters have a certain look about them. They are easy to pick out because they display specific hallmarks. Masters all have the five personal qualities outlined here.

Please note that these Markers of Mastery are not to be confused with the Pillars, Rewards or Outcomes of Mastery; or with either the process to reach Mastery or the action plans you'll create once there. The Markers of Mastery show only how we recognize mastery in others, and in ourselves. **In brief, masters maintain peak performance and top results with low personal and business costs.**



## THE FIVE PILLARS OF MASTERY

Do you remember the Virtues of Excellence, those five qualities that you need to achieve excellence? Remember how they are limited, corruptible, and ultimately costly? Do you remember how, when we pass the Falling Point, it turns on us and excellence becomes a trap? Well, when we shift to Mastery, these Pillars of Mastery replace the *Virtues of Excellence*, which were intrinsically limited, corruptible, and costly.

The Pillars of Mastery are *intrinsically unlimited, incorruptible, and low-cost*. The sky's the limit. When you work from these pillars, and not from excellence, then you are in Mastery. Then everything changes, starting with the cost/reward ratio. Costs go down, and rewards go up, exponentially.

### WISDOM

**Wisdom is the sum of our Energy, Expression, Perspective, and Intention.** It's all about knowing what is true, right, or lasting based upon experience and understanding, discernment and insight. Wisdom is self-validating: it evolves us from being merely *correct* (computers can do this) to being *right*. Wisdom is also directly linked to our legacy: it lives beyond us and abides in everyone and everything that we touch. Wisdom inspires loyalty and is the ultimate source of authority.

### ENERGY

**Energy is the stuff of life itself. It is dynamic and self-sustaining.** As physics tells us, you can transform energy, but you can't destroy it. Energy is the capacity for work. It is fundamentally generative, so it demands to be expressed in action. Energy can't be suppressed; it can't sit still. Important: we don't create it, we leverage it. We don't spend it, we release it. We tap into it. Masters know this. That's why they are fundamentally relaxed and at peace, never choking, even when the heat is on and they are pushed to the limit.

### EXPRESSION

**Expression, specifically self-expression, is energy in action.** It is the state of real inhibition that has the ability to drive change. Expression doesn't require self-motivation or have concern for outcomes; it simply puts it out there.

### PERSPECTIVE

**Perspective provides an authoritative interpretation of the here and now, as well as what is to come.** It sees deeply into the nature of people and circumstances with honesty, integrity, insight, and fearlessness. It knows the score, the real story. Perspective makes us truly visionary. Many people in excellence try to have a vision and lead from it. But a vision without perspective is merely an ego-fantasy. It does more harm than good. Masters have perspective.

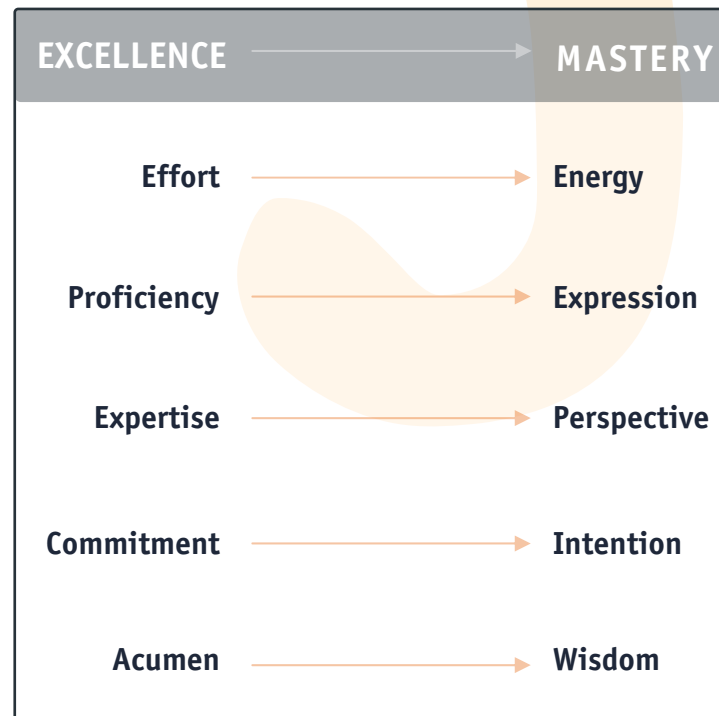
### INTENTION

**Intention has the power to make vision real.** It is what happens when we get free from distraction and decide to come from our core. Intention says "yes," with confidence and purity of purpose. True intention is different from will. Will is about ego and power, and it's prevalent in the Excellence Trap. Not so with Intention. True intention is rare, so it both inspires people and attracts the necessary resources to make vision real.

# THE FIVE SHIFTS TO MASTERY

These shifts define the escape from excellence and the attainment of Mastery. This is what must happen for mastery to appear. It is powerful to witness an excellent person recognize when they have reached the limits of excellence (virtues, corruptions, costs) and to start to make these shifts.

It's important to understand that *any* degree of progress on any *one* of these shifts will make a real difference in the cost/reward ratio, helping to drive the escape from excellence. And significant progress on all shifts will create undeniable exponential change in costs (going down) and rewards (rising up). **THIS IS WHAT MASTERFUL ATHLETES, PERFORMERS, WARRIORS, INNOVATORS, AND SAGES HAVE ALL ACCOMPLISHED IN ORDER BECOME MASTERS. IF THERE'S A SECRET, THIS IS IT.** And it's teachable, accessible, and do-able.



## FIVE REWARDS OF MASTERY

Leaders, teams, and organizations in Mastery are rewarded with exponential increases in these key measures, which in turn drive the Five Outcomes of Mastery on the next page.



### SUSTAINABILITY

Sustainability is always energized, not depleted, by engagement. Sustainability renews itself again and again; it never runs out.

### INTEGRITY

Integrity means wholeness. Integrity maintains wholeness in all situations, with no regard for outside pressures, fear, ego, or environmental white noise. Leaders, teams, and enterprises with integrity don't ask for permission or direction; they just get things done. Integrity results when we practice genuine self-expression without ceasing. This means we come from our core and from what we know to be real, *all the time*. This may sound easy, but it is rare.

### ATTUNEMENT

Attunement is the payoff for perspective. It plugs us into people and situations with a clear head and an open heart. It also aligns resources and people around a core idea or key opportunity and integrates thought, action, and agendas. It is turbo-charged alignment.

### ATTRACTION

Attraction happens when our intention is clear. This is rare, dynamic, and powerful, and easily secures resources, galvanizes partners, and leverages the environment with maximum, even unexpected, efficiency. As motivators such as carrots, sticks, and spin go out the window, attraction takes their place. This is buzz and momentum turbo-charged.

### CAPACITY

Capacity is the ability to receive, embrace, generate, and do. It is capable of exponential increases in impact, effectiveness, returns, rewards, and legacy. It's what happens when we rely on energy, not effort.

# FIVE OUTCOMES OF MASTERY

These are the *tangible outcomes* of Leadership Mastery, and deliver on the Promise we made right at the start.

- 1. LOWER COSTS**  
The Excellence Trap is a drag on performance, output, and efficiency. When excellence is overcome, this is reversed, and costs decline dramatically.
- 2. GREATER RETURNS**  
Lower costs plus higher performance equals greater returns.
- 3. GREATER REWARDS**  
Mastery does nothing less than to transform both individuals and organizations, creating and sustaining the conditions for peak performance. Business and human measures increase dramatically.
- 4. GREATER OPPORTUNITY**  
Masters are the very best at what they do, enjoying the highest stats and the most recognition. They create and attract more opportunity, and this opportunity feeds itself and so increases exponentially. Most of all, maximum opportunity remains sustainable, not a flash in the pan or a fluke. This is the luck we make.
- 5. GREATER LEGACY**  
Masters make a lasting impact and are not easily forgotten. They often become icons during their own lifetime and galvanize a large group of people after they have gone. Their life and work are a gift to those who follow.

SO, TO SUMMARIZE THE STORY SO FAR,  
THE PATH FROM EXCELLENCE TO MASTERY LOOKS LIKE THIS:

1.

FALLING INTO THE EXCELLENCE TRAP

Developing Virtues > Experiencing the Limits > Crossing the Falling Point > Virtues become Corrupted > Entering the Excellence Trap > Costs are Incurred > Looming threat of Mediocrity or Failure > Depressed Performance, Outcomes, and Rewards

2.

STOP THIS TRAIN!

**Five Failed Strategies:**

Denial, Toughness, Resignation, Escapism, Balance > LOOKING FOR A WAY *UP*, NOT OUT

3.

ASCENDING TO LEADERSHIP MASTERY

Pillars > Shifts > Markers > Rewards > Outcomes



# HOW TO BECOME A LEADERSHIP MASTER

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Parts I to III were background and description. *How* we escape excellence and reach mastery is something else entirely. Here we'll give you an overview of how we help leaders, teams, and organizations to escape from excellence and attain Leadership Mastery. To gain access to our specific tools, or engage us to work with you, please contact us [here](#).

## THE PROCESS

### A. ASSESSMENT: ARE YOU TRAPPED IN EXCELLENCE?

If you've worked to be successful, chances are you have already reached a level of excellence and are now across or crossing the Falling Point. We've developed an assessment tool, *Charism 360*, to find out. It's both a self-assessment and an optional 360-feedback tool, so we can invite input from others. But sometimes a conversation is all we need to mutually determine if you're trapped in excellence; the assessment tool will help us to understand your circumstance in more detail. The assessment is based on the presence or absence of the virtues and costs of excellence, as well as the key indicators of mastery.

### B. DISCOVERY: YOUR DYNAMIC ESSENCE

*Dynamic Essence* is a core idea for Leadership Mastery. It holds the key to getting past Excellence and reaching Leadership Mastery. It refers to the core drivers of you, your team, your business, and your brands. It's not just static and descriptive like mere "essence," but rather it is *dynamic*. It must take action. It has to do what it does. It won't be stopped. Everything that takes your time and effort that isn't serving or releasing dynamic essence is waste, cost, or loss. In excellence that's a very high percentage. But in Mastery, dynamic essence takes over. So we have to discover it, understand it, release it, and apply it in specific action.

### C. TAKING ACTION: LEADERSHIP MASTERY IN ACTION

Our work is *embedded, not episodic*. All too often, leadership development programs and consulting recommendations punch the clock and go home after teaching skills or suggesting strategy. How excellent is that?! We do better. Our *Action<sup>2</sup> Leadership Tool* is a structured action planning resource that works with you to apply your Dynamic Essence and Mastery Pillars to specific business objectives, department by department, initiative by initiative. Moreover, we work with you one-on-one (and with your senior or critical teams) to create mastery-driven action plans that are specific to you. This is supplemented by a range of other tools.

### D. ACCOUNTABILITY: MEASURING MASTERY

Masters have great stats, and their superior performance is obvious to all observers. We work with you to *create specific measures* that hold you accountable as you progress toward and attain mastery. And, in a world of often suspicious and manipulated data, we ensure that you are measuring both what is measurable and what should be measured.

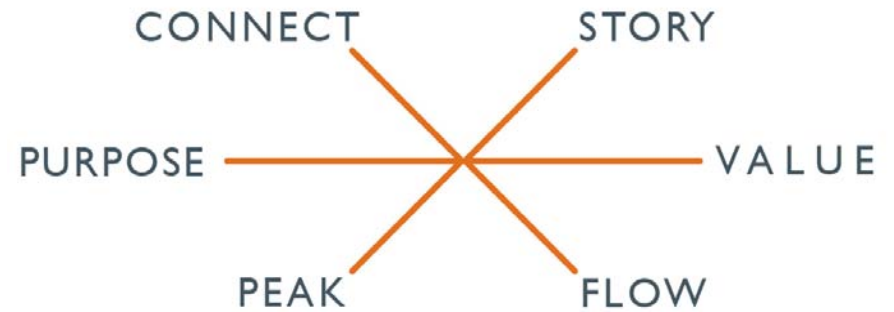


# THE CHARISM DEVELOPMENT MODEL

## WE'VE DEVELOPED A PROPRIETARY FRAMEWORK—*The Charism Development Model*—

that takes everything we know about leadership, performance, and the great mastery traditions and boils it down to six words: *Story, Value, Flow, Peak, Purpose, and Connect*. Each one is based on both a deep and profound literature and extensive practice. We've created a powerful, yet accessible and enjoyable process that ensures that you, your team, your organization, and even partners and markets (see Section V.) can identify the key drivers of each dimension.

**YOUR DYNAMIC ESSENCE LIES AT THE POINT OF INTERSECTION.**



DISCOVERY

# ABOUT DYNAMIC ESSENCE



Brands have an essence. Plants have an essence. Aristotle taught us that everything has an essence. **ESSENCE IS LIKE YOUR DNA; IT IS UNIQUELY YOURS. IT IS THE CORE OF YOU. IT'S YOUR HARDWIRING.** But here we talk about essence as *dynamic* because, whatever is at the core of you, your team, your business, your brands, and your markets, **it is all about energy and action. It can't sit still. It *must* do what it does. Its nature is to act, do, and create.** Every major wisdom tradition (science, psychology, spirituality), all over the world and throughout history, has spoken about the creative- energy- action aspect of your essence, each in their own way. Bank on it; they are onto something we need to know about!

**DYNAMIC ESSENCE IS THE CORE, IDENTIFYING, MOST BASIC, TRUTH ABOUT YOU.** It is what you bring to everything. So anything that works against it also diminishes you, and this can be almost anything. **Masters know this.** So they devote their entire life, in every moment, to *discovering, releasing, expressing, and sustaining* this core. Everything else is secondary, because everything necessary to be masterful comes from this. Masters can't develop or share their gifts without it. The alternatives are failure, mediocrity, and a life inside the Excellence Trap.

So masterful leaders don't focus on Dynamic Essence only while on vacation, or during quiet times, or on alternate Thursdays between six and eight. **MASTERS ALWAYS FOCUS ON IT. Always.** In good times and in bad, in simple moments and in times of deep decision. And they do it no matter what else is going on, or who else is in the room. ***Discovering, releasing, expressing and sustaining* your Dynamic Essence is the literally the most important thing you can do to achieve mastery;** it provides the clarity and the energy to make you a stronger leader, a higher performer, and a better person. You, your business, and your relationships all benefit.

# THE STRATEGIC VALUE OF DYNAMIC ESSENCE

Here's a simple fact: **MOST PEOPLE DON'T HAVE A CLUE ABOUT THEIR DYNAMIC ESSENCE.**

For all the development programs, competency modeling, 360° feedback, action planning, performance reviews, and more, they remain in the dark about the real deal, their greatest asset, their real core. This is because, as we have said elsewhere, **business leaders have not known about the difference between excellence and mastery, and have never had a path designed just for them to escape excellence and attain mastery.** The tools they have had mostly only create and measure excellence, and so they ultimately serve the Excellence Trap.

To escape from excellence, it is crucial to *discover*, *release*, *express*, and *sustain* your Dynamic Essence. Consider the following:

1. **DYNAMIC ESSENCE IS THE ULTIMATE DRIVER OF PERFORMANCE.** It is the ultimate driver of innovation, of alignment, of productivity. And by *not* leveraging and applying it, we can see exactly what makes sustainable peak performance, innovation, alignment, and productivity so difficult.
2. **DYNAMIC ESSENCE IS THE ULTIMATE SOURCE OF COMPETITIVE ADVANTAGE.** It is the ultimate differentiator. Experience, skills, benefits, etc. are old news. Instead, the masterful application of Dynamic Essence is where advantage lies.
3. **DYNAMIC ESSENCE IS THE ULTIMATE TEST OF STRATEGY, DRIVER OF ACTION, AND MEASURE OF ACCOUNTABILITY.** Any decision or action that goes against or fails to leverage the dynamic essence of a leader (or team, business, or brand) is a lost opportunity. It perpetuates the excellence trap and reduces results to an increment, not an explosion.

**LEADERS WHO LEVERAGE DYNAMIC ESSENCE AT ALL TIMES ARE IN MASTERY.**

# THE ROLE AND CHALLENGE OF LEADERSHIP

## LEADERSHIP MASTERY DEFINED

We've heard many definitions of the role of a leader, from maximizing shareholder value to grooming a successor. **We have a definition of leadership that we believe will prove revolutionary...**

The single most important job of a leader is this:

***DISCOVER, RELEASE, EXPRESS, AND SUSTAIN  
THE DYNAMIC ESSENCE OF YOUR BUSINESS.***

**This includes yourself, your teams, associates, partners, brands, and markets.**

This is certainly the role of the CEO and the leadership team. But this is also leadership defined, at every level.

We could tell countless stories about successful, capable, excellent business leaders who go through their day while subtly, quietly, and subconsciously driven by these popular obstacles of Dynamic Essence:

- Fear: What if things turn out badly?
- Ego: How can I look good?
- The *Five Failed Strategies of Excellence*: Denial, Toughness, Resignation, Escapism and Balance
- Misguided reliance upon the *Virtues of Excellence* after having crossed the *Falling Point*

**No successful person wants to admit that fear, ego, etc. play a role in their lives.** Isn't that only for jerks and losers? NO! Fear, ego, the *Five Failed Strategies*, and an over-reliance upon what made us excellent in the first place actually define the human condition for everybody who has not shifted from excellence to mastery. It is all of us. Welcome to the club.

The only escape from excellence is to *discover, release, express, and sustain* your Dynamic Essence, and that of your teams, business, partners, brands, and markets. Period. This is the role of leadership. Masters put it into action.

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# ENTERPRISE MASTERY & MARKET MASTERY

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# ENTERPRISE MASTERY

Throughout this e-book we have said that Mastery applies to leaders, but also to the entire enterprise, and to markets as well. And so it does. Here's how:

A leader who is shifting to Mastery soon requires that his or her people also have the benefit of doing so. This is where Enterprise Mastery comes in. An enterprise includes all teams (leadership, critical, and work teams), associate populations, as well as strategic partners. All of them can be trapped in excellence, each in their own way, yet each can align their core with the dynamic essence of a leader as a first step in escaping excellence and transforming performance.

Moreover, each of these groups has a dynamic essence of its own that can be discovered, released and applied to attain mastery in its own right. All teams, corporate cultures, and partner relationships can reach mastery. **AN ENTERPRISE IN MASTERY SEEKS MASTERY AT EVERY LEVEL, AND ALIGNS AT EVERY POINT OF CONTACT.** Our framework and tools can be applied to each of these constituent groups to help them escape from excellence and experience mastery, with all the shifts, rewards, and outcomes you can expect from mastery.



# MARKET MASTERY

More than a “marketing” idea, Market Mastery represents a cutting edge approach to align businesses and brands with markets. A Market Master understands that any business comprises two animating ideas:

1.

## THE BUSINESS IDEA

This describes what the business *does in the market*, and how it adds value, expressed as a value proposition for transaction. The audience of the business idea is analysts and the financial markets. Management owns this.

2.

## THE IDEA OF THE BUSINESS

This is the other side of the coin and describes what the business *means in the culture*. What does it represent? What is it associated with? How is it used, and by whom? How is it misused, abused, and re-appropriated? What drives momentum, affinity, relevance, and loyalty? Management cannot control this, but only influence it; consumers and culture owns it.

A Market Master moves past common tools like SWOT, positioning, performance ratios, and other valuable but limited measures, and applies the *Charism Discovery Model* to ask, **What is the Dynamic Essence, the real, animating, undeniable, and passionate core, of *this* consumer *market* base?** How to do we capture and leverage it to maximize affinity, involvement, connections, advocacy, loyalty, extendibility, and opportunity?

# MARKET MASTERY METHODS

The Charism Model can be applied to provide answers to specific questions that reveal the Dynamic Essence of a brand and a market. This discovery method surpasses current market and research tools, and can drive product development, marketing, sales, and competitive strategy.

A Market Master asks their customers:

- What drives their *Story* yesterday, today, and tomorrow?
- What *Value* do they seek?
- When are they in *Flow*, with and without our product/service?
- What is their *Peak*, with and without our product?
- What is their ultimate *Purpose*, viz. our product and overall?
- Where and how do they *Connect* with our product and with each other?

Then they ask the same questions of the personified *brand* itself.

Then they ask the same about the *company* and its leadership, culture, and partnerships.

Then they use this learning to change the game, to make bold and breakthrough decisions, and to take innovative actions in product development and marketing that confound their competition and drive dramatic results.

**BETTER INFORMATION > BETTER INSIGHT > BETTER IDEAS > WISER DECISIONS > BETTER INVESTMENT > BETTER RETURN.**

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# THE WRAP

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## WISDOM FROM THE MASTERS

A close acquaintance of mine, whose work involves closely advising a long list of famous people, once said this about an idea of mine, “If it is what it is, people will flock to it and it will soar.” That simple and informal statement was actually rather profound. “If it is what it is,” ...*exactly*. This refers to leadership from dynamic essence, without dilution or distraction. This is voice of mastery.

In his recent memoir, *Born Standing Up* (itself something of a primer on mastery), Steve Martin points out that many people aspiring to showbiz success want to learn from him all about the predictable steps that they can take to reach their goal. Instead, Steve always only tells them, “Be so good that they can’t ignore you.” It seems to us that he meant something beyond skill, effort, strategy, and acumen, something beyond excellence. He meant something so undeniably real that it is infectious. We believe he meant go find and express your Dynamic Essence. This is the perspective of a master. To miss this is to miss the whole point, and to waste years. Many people can spend their careers and never learn this lesson.

We have taken these two thoughts very much to heart, and hope you do the same.



# FINALE

**Thanks for reading this e-book.** We hope that we have added value and helped to jumpstart your own escape from excellence and ascent to leadership mastery. **Our life's work is to bring the knowledge of the qualitative difference between excellence and mastery, and the means to escape one and attain the other, to leaders and their businesses.**

Let's briefly revisit the premise we shared and the promise we made at the beginning:



## THE PREMISE

If you have pursued and achieved excellence, all your hard work isn't paying off like it should, or like it could. This is because excellence is a trap. It is nothing less than the largest hidden cost in business. **The hard fact is that you can't overcome the costs of excellence by being even more excellent. You must escape it.** And that changes everything.



## THE PROMISE

As a masterful leader, you and your business will sustain peak performance, using fewer resources. And your business will experience exponential rewards, because mastery is applicable to leaders, teams, entire enterprises, and to markets themselves. **If the Excellence Trap is the largest hidden cost in business, then the Escape from Excellence to reach Leadership Mastery is the greatest source of competitive advantage and sustainable performance.**

## NOW LET'S ADD THIS...

### A PREDICTION

Having read this book, **we predict that you will see signs of the Excellence Trap all around you.** At this point, you can already see more than its effects; now that you know how it works, you can see it directly. The virtues, the falling point, and the costs; the incremental change, the unnecessary effort; the failed strategies; and the false assumption that all this is just the way things are, that excellence is as good as we can hope for. **You will see all this for what it is, a trap. And you will start to make your own way toward leadership, enterprise, and market mastery.**

### AN INVITATION

**In most traditions, people who want to be initiated into mastery have to earn an invitation,** based on their recognition of the Excellence Trap and their sincere desire to escape it. You've read to this point, and if you are resonating with or intrigued by the ideas and vision we've presented, you are hereby heartily invited to visit us [here](#), or check out our Blog [here](#). We'd love to talk with you or work with you!



C H A R I S M

## ADVISING

*Leadership Mastery:* We work with senior leaders, leadership teams, and designated successors on an individual basis to escape from excellence, leverage dynamic essence, and realize leadership mastery.

*Enterprise Mastery:* We do a mix of individual advising and workshop sessions with critical teams, strategic partners, and broader associate populations.

*Market Mastery:* We consult with your specialists and partners to innovate product and brand development, what we call Market-Making, based on the Charism Mastery Model and the concept of Dynamic Essence.

## SPEAKING

Our ideas and dynamic presentation style ensure a memorable keynote event that will kick start a commitment to escaping the Excellence Trap. Book us to speak at your next event [here](#).

## WORKSHOPS AND SEMINARS

As leaders seek to escape from excellence and drive a transition to leadership, enterprise and market mastery, we can implement workshop-based programs for larger populations. Learn more [here](#).

## PARTNERSHIP

Partnerships are more common and crucial than ever. An aligned mastery-driven enterprise must include partnerships. We work with you and your key partners on an individual or seminar basis, as needed.

## STEWARDSHIP

Our work is embedded, not episodic. So we are often invited to attend and participate in crucial strategic meetings to ensure that excellence is overcome, mastery is pursued, and alignment is strong at all critical decision points across the business.

# WORK WITH US

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C H A R I S M

## ABOUT THE AUTHOR



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**Bill Wilkie** is founder of Charism Advisors. He provides individual advising to senior leaders focused on the transition from excellence to mastery, and then expands this work across the business via seminars and consulting. He is also a speaker at business events.

As a thought leader, Bill is creator of the Charism Model of Leadership Mastery, and was first to identify and diagnose The Excellence Trap. He has created a unique, paradigm-making path to Mastery specifically for leaders. His blog, *Escape from Excellence*, can be found at [www.charismadvisors.com/blog](http://www.charismadvisors.com/blog).

As a strategist, Bill has worked on behalf of global brands such as Microsoft, MSN, Xbox, Swiss Army, Fidelity, W.L. Gore, Chevron, General Motors, AGFA, Amazon, Wolverine, Seventh Generation, and many more. He has been a brand strategist for JWT, Wieden+Kennedy, and McCann-Erickson.

As a musician, he has performed on internationally distributed albums for award-winning independent labels, on television jingles, and at festivals, showcases and clubs, and on a few hallowed concert stages. He has composed 10 CD's worth of music, and captures it in his recording studio. The dynamic between intense study and free improvisation keep Bill sharp on a daily basis.

As a seeker, Bill has both formally studied and deeply engaged the world's great mastery traditions. He favors no single path, but rather integrates and applies the best of these schools and traditions as appropriate on behalf of great leaders.

Bill studied music (jazz and theory) at The New England Conservatory of Music via a dual degree program with Tufts University, holds a Bachelors Degree from Fairfield University in both Religious Studies and Music, with a minor in Applied Ethics, and earned a Masters Degree from Yale University Divinity School concentrating in Ethics, where he also did advanced coursework in the schools of Management and Law.