

Suggested APA style reference:

Browning, F. (2007). *From counselor to CEO: Opportunities, challenges, and rewards*. Retrieved August 28, 2007, from <http://counselingoutfitters.com/vistas/vistas07/Browning.htm>

From Counselor to CEO: Opportunities, Challenges, and Rewards

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Counselors enter the profession of counseling for many different reasons. Altruism, empathy, and the desire to make a difference in life are just a few of the motivating factors that lead individuals to pursue a graduate degree and the path to professional licensure. The desire to make a qualitative difference in life, however, may soon encounter the reality that one's sphere of influence may be limited by one's position in life. To increase one's sphere of personal and professional influence, some counselors realize that a change in professional standing is required. The noble desire of choosing to be a Servant Leader as a counselor (Kahl, 2004) may become a personal and professional

issue when the financial and welfare needs of one's family are factored into the counselor's quality of life. At this point, some counselors may start to contemplate entry into the administrative hierarchy of a Helping Organization as a means to expand their societal sphere of influence, establish a path to an acceptable and increased livelihood, and enhance their professional status. At other times, successful and well-respected counselors are sought out to lead Helping Organizations based upon their success as a counselor. The result may be the Peter Principle (Peter, 1979) played out in reality dependent upon the ability of the counselor turned CEO to make the transition to a new set of skills and performance expectations.

These new set of vocational skills and expectations need to be understood and mastered by the new CEO if he/she is to survive in the environment of administration, management, and governance. This environment is foreign to the empathetic, process-oriented arena of counseling. It is a tough environment that may permit feelings, empathy, and process but with limits. The survival of the organization and its mission often take preeminence over the needs of the individual employee and client. The new CEO answers to many constituencies versus the counselor's accountability to his/her client and supervisor. This is not to say that some of the skills of the counselor are not valuable once one assumes a managerial/administrative role. Facilitation skills such as active listening, challenging, probing, prompting, summarizing, clarifying, empathetic communication, and even confrontation skills can be assets to the new CEO (Egan, 2007). The new CEO, however, must increase his/her intuitive and perceptive skills and

avoid idealistic naivety. The formal and informal rules of the organizational game are different for the position of CEO. The new CEO who has been trained as a counselor and has accepted the ethical standards and values of his/her professional must realize that his/her success, effectiveness, and longevity in the role of CEO are highly dependent upon becoming the master of a new set of behaviors or skills. The counselor transitioning into the new role of CEO avoids and ignores the need to adopt these new skills at his/her own risk and potential vocational demise.

The new skills that are needed for success as a CEO of a Helping Organization include negotiating and decision-making talent, leadership capabilities, organizing abilities, strategic “visionary” planning, financial astuteness, an understanding of governance politics and expectations related to the CEO and organization, and an appreciation of historical organizational dynamics. The clinical expertise of the new CEO to understand and explain the needs of the clients to the numerous constituencies, e. g., Board members, donors, government representatives, is an asset but it is not enough to succeed and survive in the rough and tumble environment of organizational management and administration.

The negotiating skill relates to the CEO’s ability and will to take a stand, i.e., fight for a principle or need, and the ability to bring about compromise ever mindful of organizational needs and mission. Evolutionary research indicates that species willing and able to fight, negotiate, and compromise when necessitated, succeed in the long run (Kastenbaum, 2007). The Rogerian principle of general acceptance of the presenting

issue may not always apply in the realm of administrative and managerial negotiation (Rogers, 1951). Organizational growth and development requires more than just insight. It requires a willingness to direct, persuade, and convince. These are skills that one does not learn in counselor training. They are either developed over time or are innate to the personality of an individual. They are invaluable to a CEO as he/she becomes the point person for a myriad of organizational needs of a Helping Organization. CEOs as President Bush recently stated are called upon to be “decision-makers” (Kellman, 2007). CEOs are required on a daily basis to negotiate, persuade, and make decisions as they lead and provide direction for their organization.

The counselor who assumes the new role of CEO may have difficulty making highly objective and reason-based decisions, especially if his or her decisions have been historically filtered through their “feeling filter” first. This difference of decision-making based upon feelings versus thinking has been previously noted by the studies of Jung and extrapolated by Isabel Myers and Katherine Briggs (Martin, 1997). One of the counselor’s previous strengths may become a stumbling block and barrier to developing an objective decision-making ability. The counselor ethical code of “do no harm” may need to be expanded to “do the least harm” when making crucial organizational decisions. As the new CEO soon realizes, every decision carries with it a loss or negative consequence. It is the new CEO’s responsibility to make decisions that promote the greatest degree of positive welfare for his/her organization, clients/customers, employees, and other stakeholders.

Two skill areas that are critical to the success of the new CEO are leadership and visionary planning. A recent survey by ClearRock, a business consulting firm, indicated a dearth of strategic thinking and leadership skills among individuals seeking to assume positions of higher responsibility (Dearth of Talent, 2007). A new CEO must step out of the group of helpers with a vision to lead the organization to the next higher level of excellence. This could include special accreditation by CORE, COA, JCAHO, a major capital improvement program, an endowment campaign, an upgrade of technology, new staffing patterns, and other numerous financially, technically, and politically challenging ventures. A new CEO is required to think and envision the organization not in terms of months but years. A counselor seldom needs a vision for his/her client in terms of years. A new CEO must quickly demonstrate creative, proactive, action-oriented planning skills as a leader who will lead the way into the organization's future.

Counselors who have transitioned to the CEO role must also demonstrate organizing skills. Helping Organizations can be very chaotic and confusing. The new CEO may be called upon to functionally reorganize the organization in an effort to increase efficiency and effectiveness. This is not the mere skill of drawing an organizational chart and placing individuals into little boxes. It is a skill set that requires intuitive and technical expertise and wisdom to know where professional boundaries and responsibilities should be drawn and who in the organization is a "best-fit" for the task at hand. The organizing process may mean shifting staff to new positions, up/down/laterally, in the organization. It may also point out weaknesses in the organization resulting in the dismissal of some

staff and the hiring of more qualified staff. The entire process can be painful for the staff and the new CEO. Due to the instability that may result from such changes, the CEO needs to be sensitive to the organizational culture and the political depth of some relationships within the organization and community. Some changes in personnel staffing take time. Such changes should be done methodically and with the full support of the Board of Directors. The politically savvy CEO will thoroughly calculate the ramifications of such changes prior to taking action, especially if the change involves deep-seated organizational and community relationships. The best changes sometimes are “slow changes” that have received well thought out examination and analysis. Regardless of whether the change is swift or drawn out, it may be necessary if the organization is to move to a higher level of productivity and effectiveness.

Financial astuteness is another new skill that a new CEO needs to acquire as soon as possible. Any counselor considering a move into the administrative hierarchy would profit by doing some academic preparatory work. A solid understanding of financial accounting, fund accounting, governmental budgeting and appropriations of entitlement programs, endowment programs, and capital project funding instruments can put a new CEO in good standing with his or her constituents and stakeholders. Today, as organizational financial solvency is increasingly analyzed and challenged, it is vitally important to have qualified financial personnel. At a minimum, a qualified financial officer, generally a CPA, is needed to assist the CEO in the financial management of any sizeable Helping Organization (\$1 million budget and above). Hopefully, the financial

officer is also technically knowledgeable regarding accounting software packages appropriate for the organization. The new CEO will soon realize that his or her role financially is to maintain solvency of the organization. If the organization is a for-profit Helping Organization, an annual profit is the goal. If the organization is a non-profit Helping Organization then a breakeven or an agreed upon financial surplus is the goal. Regardless of the type of organization, without financial solvency, the mission fails and many stakeholders suffer from the loss, i.e., clients/customers, employees, donors, stockholders, and other constituents. As a new CEO, it is advisable to have an initial financial audit before assuming financial responsibility for the organization. Continued annual audits, strong financial internal controls, and an active budget and finance committee of the board of directors are necessary components of a solvent, growing, and financially healthy organization.

Lastly, financial resources beyond solvency are needed if an organization is to have the means to maintain, enhance, and expand its services. A proactive, creative Development Officer can do much to help raise the extra financial resources needed. Fund raising is another area of needed expertise that the new CEO will have to master. Working with the Development Officer and Board of Directors, the new CEO has the opportunity to build a financial base, i.e., financial reserves and an endowment, to meet the needs of the organization for years to come. It is professionally incumbent upon a CEO to pass on a financially viable organization to his or her successor.

Beyond the financial, organizing, and clinical skills that can facilitate the move of the

counselor into the CEO role, there are governance realities that need to be understood and mastered. Answering to a Board of Directors is not the same as answering to a counseling supervisor. Expectations and norms of behavior are very different in many respects. Board members may be paid or may be volunteers. Regardless of how they attain the position of director, they all have their own agenda and perspective on how a Helping Organization should operate and what its purpose and priorities should be. This point can be missed by the novice CEO. Even as skilled and knowledgeable counselors, we sometimes forget that everyone has a “personal agenda”. Melody Beattie urges in her writings to let go of the notion that individual’s do not have personal agendas (Beattie, 1990). In the role of a new CEO, it is even more important to become familiar with each board member’s spoken and unspoken agenda. It is not enough to only interact with board members once a month or at the quarterly board meeting. Wise CEOs make special arrangements to visit often in person or electronically with their board members. Visiting in person is the most effective way to enhance the establishment and maintenance of rapport. As counselors, a key to an effective counseling relationship is the initial establishment and maintenance of counselor-client rapport. However, a former counselor assuming the role of CEO may be so overwhelmed by all of the organizational tasks before him or her that establishing a deep, understanding rapport with each board member may be overlooked. The new CEO’s assumption that he or she and the board members are in one accord regarding the mission, the resources, and the operations of the Helping Organization can be a fatal career assumption. As in counseling, dysfunction is not always apparent upon the surface. When a crisis arises in an organization, then

destructive dysfunction is revealed often resulting in irreparable harm to individuals and the organization. A wise CEO will do his or her best to keep an honest and transparent relationship maintained with board members to avoid any detrimental barriers to efficient and effective operations and governance. This is a skill that cannot be overemphasized if a CEO wants to establish longevity to his or her career efforts.

One final skill that will put a new CEO in good standing with his or her board, staff, and constituents is an empathetic, appreciation of organizational history. The implied and even explicit directions given by a board to a new CEO can be confusing and misinterpreted. The directions may be interpreted as “clean house”, maintain the status quo, or go slow with implied need for change and growth. Again, a wise CEO walks slowly at first with his or her board members to clearly establish what their expectations and desires are regarding the organization. It is too easy to jump to conclusions about an organization and its dysfunctions as a new member of the team. Often such quick conclusions are incorrect and knowing more of the historical circumstances of the organization lessens the tendency to be judgmental. Staff is generally distrustful and cautious when a new CEO is hired, especially when he or she is a newcomer from outside the organization. Just as the CEO establishes rapport with the board members, it is important to establish rapport with the staff and actively solicit input from them. This does not mean establishing rapport with only direct reports. It means meeting, listening, and learning about the staff in its entirety. The more a new CEO can learn about historical events, formal and informal relationships within the organization, and

performance issues within the organization, the more effective the CEO will be in assessing morale, motivation, resources, and strategic direction needed for the organization. The CEO is called upon to focus on the future of the organization. To ignore or deny the present or past, increases the possibility that the CEO will overestimate or underestimate the organization's ability, willingness, and readiness for change. Stability sacrificed for change may yield disaster, chaos, and diminished effectiveness rather than enhanced effectiveness and productivity.

The new CEO has quite a learning curve as he or she masters the administrative/management paradigm. The road to becoming a successful CEO is not easy. All constituents may not agree with decisions made by the CEO. Senator John McCain states that "although it hurts when people think less well of us than we deserve, our integrity, our self-respect, and our happiness do not ultimately depend upon the opinion of others"(McCain, 2005, p. xvii). This is a statement that all CEOs whether new or old need to keep in mind. Healthy, functional techniques and methods to survive and thrive need to be developed by each CEO. These may include joining a peer support group, attending a professional transition management seminar (American Management Association, 2007), personal and professional networking within the community, professional association participation and service, maintenance of life enriching activities outside the work arena, the establishment of personal and professional boundaries, and personal self-care. Social service to the community can be highly rewarding and highly draining from an emotional, physical, spiritual, and psychological perspective. A strong

support system consisting of family, friends, and peers is vitally needed to keep the new CEO's creative, leadership skills keen and fresh. Without the development of a strong support system, the new CEO may eventually lose the heart and energy to persevere in making a qualitative difference in society. With a strong support system, a healthy CEO will seek the best, most ethical and most effective way to be a true Servant-Leader (Greenleaf, 2002).

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