

THE  
FOURTH  
MOON



A STEP-BY-STEP PROCESS FOR  
SUSTAINABLE  
BUSINESS SUCCESS

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## PREFACE

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# Discovering the Fourth Moon

In this book, I show how any business can reach optimal and sustainable success. I do this by using a powerful metaphor based on Galileo Galilei, the famous Italian astronomer, and the four moons of Jupiter. Through this metaphor and through the journey of business owner Tom Dylan and his team, I will demonstrate time-tested, proven, and easy-to-implement success strategies for achieving spectacular success.

As you will discover in the pages ahead, commencing your journey and reaching each of the four moons sequentially is a practical step-by-step process that any business owner and his or her team can implement. Like anything worthwhile in life, there is always commitment and effort required. Knowing isn't doing; you have to commit to the same habits and disciplines, and repeat them over and over again. However, if you are open to learning and committing to specific habits and disciplines, you too can reach the Fourth Moon.

The good news for you, reader, is that the Fourth Moon metaphor is simple, elegant, and proven. Once you understand the underlying principles,

you and your team can immediately implement these within your business by following a step-by-step process.

The characters and case studies used throughout the book are fictitious and drawn from the hundreds and hundreds of businesses I have worked with and learned from over the years. And in the final pages of this book, I will direct you to important resources to help you launch your journey to the Fourth Moon.

As of today, I've worked with nearly a thousand businesses, experience that has taught me a great deal about what it takes to succeed in business and in life. But how did I even get started with this Fourth Moon business? Where did the idea come from? To help you get a sense for the background of this one-of-a-kind approach, I want to share the short version of my path to my own Fourth Moon.

## **THE JUNIOR ENTREPRENEUR**

As a kid, I remember being fascinated by people, language, and words. And of course, numbers.

I spent hours watching and listening to people. Studying their mannerisms and remembering their faces. I loved being a people-watcher. Human beings are by far the most important, fascinating, and perplexing objects in existence. Some people are obsessed with history or geography. But for me it is human beings. This interest in people has led me to acquire an uncanny, almost photographic ability to remember people's faces. I consistently recognize people from all aspects of my life, often as far back as when I was a young child.

I was also fascinated by language and words, or more particularly phrases, sayings, and colloquialisms—those wonderful colorful word strings that adults would use to make a point. Slang and rhyming slang also captivated me. I would hear adults come out with these clever and hilarious sayings and commit them to memory. I'd then wait for the opportunity to drop them into discussion in just the right context. I recall my young friends sometimes laughing at me and telling me I'd made these phrases up. More often than not, they'd check with their parents after school and report back the next day reluctantly admitting the phrase I'd quoted did in fact exist. I would go

home quite chuffed at these verbal victories. I confess to having taken this sport to a higher level as an adult—crafting my own phrases and analogies. It’s fun and makes people smile. Makes them think.

Numbers were my other love. I loved the way in which numbers interacted with each other and the world around me. Calculating sports scores, handling money, and adding/multiplying/subtracting/dividing numbers were practiced and honed at school and home. I still believe those four buttons on a calculator are the most important to understand. They’re all you need to know about mathematics in business.

I can vaguely remember my first entrepreneurial experience. Our neighbors were apple growers and they needed some help picking up the “windies.” The windies were the apples that had been blown off the tree by the wind. While bruised and unsuitable for eating, they could be used for juicing. The task was set for me to work through the orchard picking up the apples from the ground and placing them in wooden boxes. I’m told by my parents that I worked diligently for quite some time over that weekend. After my work was through, I discovered to my surprise that I had been paid a fixed price per box filled. This was extremely exciting to a young boy, and I pocketed my earnings with great pride.

The apple experience led on to several other early entrepreneurial ventures. My father taught me how to mow our lawns as well as general troubleshooting of the lawn mower. With these skills, I was able to offer mowing services to my neighbors, who were more than happy to employ me. A car-washing service soon followed. School provided a market for selling sports fan merchandise, where I learned to buy wholesale and sell retail.

Extensive residential housing development in our neighborhood led to a proliferation of recyclable aluminum cans and glass bottles left on housing lots by thirsty builders. This opportunity provided me and my childhood mates with a rich vein of moneymaking recyclables right in our own backyard. The trick was to get on site quickly at the end of the working day after the builders left. I still remember sitting on the family couch and watching a TV advertisement telling us that the recycling return deposit on bottles was doubling. I couldn’t believe my ears. My large stock of bottles had just doubled in price overnight. I was elated.

## THE ADOLESCENT APPRENTICESHIP

The adolescent years were dominated by sport, social activity, and casual employment. As soon as I could get a casual job, I was there. An attitude of “why not” led me into casual and vacation employment in supermarkets, IT distribution, textile warehousing, hospitality, and even road construction.

I happily did everything and anything to gain experience. I even negotiated with my high school to do a work experience placement two years in a row, when only one year’s placement is the norm. I craved experience and thrived on learning new skills and industry knowledge. The greatest gift this adolescent apprenticeship gave me was the skill to be able to communicate and build rapport from the cleaner to the CEO.

The other turning point was the opportunity to attend corporate training as a seventeen-year-old. My father was employed by IBM and was attending an in-house training course. The course was based on new-age thinking to achieving your potential, compiled and delivered by the legendary Lou Tice. The material was very state-of-the-art in the mid-1980s and introduced me to positive thinking, affirmations, visualization techniques, and so much more. It was a watershed moment for me, and I studied the techniques diligently, resulting in the dramatic improvement of my grades and achievements over the next six months of my final school year.

## THE ADULT APPRENTICESHIP

I still remember the day. I had nearly completed my commerce degree at the University of Melbourne. The hottest job to get offered was a graduate position with the prestigious “Big 8” international chartered accounting firms. I can still recall the envelope arriving in the mail and taking private sanctuary in the household toilet to open it. To my amazement, it was a job offer from Deloitte—one of the prestigious firms. I was in!

That ticket led me to get paid to learn, observe, and assist businesses of all different sizes and contrasting industries on a daily basis. How lucky was I? My accounting career gave me exposure to hundreds of businesses and culminated in becoming a manager of a team of accountants. While this stage of my career had been incredibly educational, challenging, and rewarding—the entrepreneurial voice inside kept calling me.

There were two things at play at this stage of my career. First, I felt my outgoing personality and style were being constrained and compromised within the confines of a professional services firm. Secondly, the entrepreneur's voice was getting louder. My mind was constantly occupied by ideas, thoughts, and visions of breaking free and starting my own business.

## **THE APPRENTICE BREAKS FREE**

At age thirty-one, I busted out.

As part of my chartered accounting role, I had completed training in recruitment, conducted graduate recruitment, recruited industry positions for clients, and managed a young team of accountants. I enjoyed developing these skills and felt I had a natural flair for identifying and recruiting talent.

As a result, a fellow manager and I decided to break out on our own and start a recruitment agency specializing in finance personnel. Taking up a serviced office in the central business district, we had no clients, no jobs, and six months of cash burn. Luckily, we survived this start-up phase and became known for our consultative approach to recruitment. We were accountants recruiting accountants. We knew our market, and it was fun and exciting. Heady days!

After six years, I sold out my interest to my partner and took a twelve-month sabbatical. This period, and the resultant search for my next venture, was one of the most challenging stages of my life.

I had exposure to hundreds of businesses, had recruited hundreds of people, and had navigated my way through my first serious entrepreneurial venture. However, I honestly didn't know what was next. I knew what I didn't want. I didn't want to work in a gray office. I wanted to be authentic and do something special—something that really mattered to both the people I served and to me.

## **MY DISCOVERY**

Out of a searching sabbatical year finally came clarity. What if I were to be authentic and fulfill my desire to help people? What if I worked from home and saw my family? I could set up a business my way, work with people I respected, do great things with them, and operate on my terms. It was a lightbulb moment.

I thought of all the things that annoyed clients of professional service firms. And I reversed them. I would charge fixed fees. I would cap the number of clients I worked with. I would deliver exceptional personalized service. I would consult, coach, and mentor privately owned small and medium-sized businesses.

In my work, business owners explain to me they want to move from A to B. This might involve tangibles such as money, people, time, or resources. Alternatively, it might involve intangibles such as stress, reputation, relationships, or satisfaction. I would then help these clients focus on their key priorities (described as Mission Goals in the book) and facilitate them toward achieving their goals and dreams.

I am so fortunate they pay me to do this work that I love so dearly. For me, there is nothing more satisfying than helping an individual or team succeed.

## **WHICH LEADS ME TO THE FOURTH MOON . . .**

I'll let you learn about the Fourth Moon as you read ahead. But for the moment, a little bit of background won't hurt.

As I filled my coaching business with clients under my own leveraged model, I was able to quarantine time for other important activities. Not being part of the rat race allowed me to fertilize an open mind and continue my commitment to a lifetime of learning. I made time available to study philosophy, meditation, marketing, nonfiction writing, screenwriting, digital media, speaking, and publishing.

I also dedicated over four years to volunteer mentoring for the Reach Foundation. The Reach Foundation was jointly founded by Jim Stynes and aims to help at-risk youth pursue their dreams. I was involved in programs, workshops, business incubators, and one-to-one mentoring to help youth pursue their business dreams.

And finally, you are reading this book because of the discovery of my Fourth Moon. Without my discovery, I would never have had the vision, inspiration, and time to create this important message and put it into print.

For me, this book is the culmination of decades of commitment, work, and learning. The Fourth Moon is a destination I cherish and want to share with the world.

For you, I hope you enjoy this book, understand its key messages, and start a journey to your Fourth Moon.





## INTRODUCTION

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# The Insights of a Famous Italian Astronomer

**T**he discovery of the four moons of Jupiter changed man's relationship with the universe. Believe it or not, it is also the discovery that will ultimately transform your business and personal life. As we travel together to the Fourth Moon through the pages of this book, you will undergo a transformation in your relationship to your business that will be as breathtaking as space travel.

Our journey begins in the laboratory of a scientific genius. Gazing into the night sky with a powerful telescope of his own creation, Galileo Galilei was the first human to see it. The seventeenth-century Italian astronomer, physicist, mathematician, and philosopher was searching for proof—proof that the planets in our solar system revolved around the sun, not the earth. All the major institutions of the day actively opposed Galileo's belief in the “heliocentric view” of the universe as postulated a century earlier by the astronomer Copernicus.

But Galileo believed that the benefits of discovering the truth far outweighed the costs of accepting a popular misconception.

One evening in 1610, Galileo spotted them: three heavenly bodies close to Jupiter. Amazingly, the next night he even spotted a fourth. At first he wasn't sure if the four heavenly bodies supported his theory. Only after several days of careful study did he determine that the bodies actually orbited Jupiter. The Galilean moons, as they were later called, disproved the prevailing theory of the day: that all heavenly bodies circled the earth. From that moment on, science was free to explore the full potential of the cosmos.

In commerce, as in science, we must understand basic truths in order to bring about desired results. Just as the discovery of the Galilean moons laid the groundwork for the growth of modern science, your discovery of the Fourth Moon will enable you to realize the growth and financial success that you have only imagined.

Are you ready to discover the Fourth Moon? Let's begin.

## **WHAT THE DISCOVERY OF THE GALILEAN MOONS HAS IN COMMON WITH BUSINESS SUCCESS**

Galileo possessed three important attitudes that assisted him on his path to discovery.

First, he went into his investigation with patience, not knowing exactly what he would discover, but with the commitment to make detailed and painstaking observations. Jupiter's moons were a surprise. You, too, will require the patience to make detailed observations about your business.

Second, he took careful observations, from which he drew conclusions with an open mind. His discovery disproved geocentrism. You, too, will have to review your observations with an open mind and be prepared to draw unexpected conclusions.

And third, he persevered with his conclusions despite the opposition of the leaders of his time. You, too, will have to persevere, sometimes contrary to the views of others, to reach your Fourth Moon.

Patience. Open-mindedness. Perseverance.

Imagine the patience required of Galileo in conducting his nightly observations. After all, up until the night of his discovery, the four moons were undiscovered celestial bodies. His discovery was completely unanticipated.

Most of us struggle to maintain patience in seeking a known outcome. But the patience required to search for an unknown object or phenomenon is unfathomable.

The strength of belief in the geocentric view in the seventeenth century was overwhelming. The theory that Earth was the center of the universe sat perfectly with the Church, the State, and the ego of humankind. Galileo's willingness to adopt a view contrary to this universally accepted theory shows the brilliance of the man, particularly when he was able to prove it was completely and gloriously wrong!

Of course his discovery of the four moons not only challenged the accepted wisdom of the time, but even more acutely it challenged the authority of religious and political leaders. Despite irrefutable evidence, his amazing discovery unwittingly put him at odds with the powerful Roman Catholic Church. He faced a Roman Inquisition, and despite being cleared of any offense, he was condemned by the Church to recant, and was held under house arrest for the rest of his life—some eight years. The level of perseverance required to hold on to his beliefs in the face of this demonization and persecution would have broken most mortals.

Have you ever ignored new information or a different perspective that challenged one of your long-held beliefs? There are many people who will challenge your views despite the evidence or research you may have to support them. Critical family members, friends, or business associates can stop you from taking action and pursuing your dreams and goals. Partners, employees, and suppliers may not share your vision. Financiers, advisers, and government departments aren't in the business of risk taking and can stifle—even kill—your entrepreneurial spirit, if you allow them.

Just like Galileo, you need to be strong, even if it means being contrarian, as you follow through with the strategies and disciplines that are linked to your success.

## **ADOPTING GALILEO'S ATTITUDES**

As a business owner you need to adopt Galileo's attitudes of patience, open-mindedness, and perseverance.

With patience, you can make powerful observations from which to draw

revolutionary conclusions. With open-mindedness, you can reengineer your business without self-imposed or external limitations holding you back. Of course this reengineering will come with the typical challenges of change management. But tenacious perseverance will carry you and your business beyond these teething problems.

Regardless of your industry or the size of your business, there are principles of success that are universal. Combining Galileo's attitudes with time-tested and proven strategies, I'll show you how to travel to Galileo's four moons in order to strategize, implement, maintain, and—most importantly—leverage your success. All you have to do is join me on a journey to the Fourth Moon.

## THE STRUCTURE OF THIS BOOK

Soon you will be introduced to Tom Dylan, owner of Dylan IT, whom I will be taking on a life-changing journey to the Fourth Moon. If Tom can ultimately reach the Fourth Moon, a universe of unlimited opportunity awaits. But he must be prepared to commit to the journey and navigate its course.

To help you get to know and recall the individuals who work with Tom at Dylan IT, I will use throughout the book nicknames based on each employee's role within the company:

<b>Name and Role</b>	<b>Nickname</b>
Jimmy—Operations Manager	Jimmy Operations
Livy—Senior Consultant	Livy Consulting
Charlie—Sales Manager	Charlie Sales
Willy—Finance and Admin Manager	Willy Finance

I've structured the journey to success using the metaphor of the Galilean moons. The metaphor of the Fourth Moon provides a step-by-step guide to achieving optimal and sustainable success that any business can follow.

The First Moon is the moon of *strategy*. When you visit the First Moon,

you develop your Strategic Plan. The Strategic Plan will be referred to as the Mission Plan.

The Second Moon is the moon of implementation. When you visit the Second Moon, you implement your Mission Plan.

The Third Moon is the moon of maintenance. When you visit the Third Moon, you commit to maintaining the strategy within your organization.

The Fourth Moon is the moon of leverage. It is the furthest moon and is only reached by a small percentage of businesses. If you reach the Fourth Moon, you will learn how to leverage true success within all aspects of your business and personal life. The Fourth Moon is the ultimate goal for any business owner, and offers extraordinary opportunities and riches.

Businesses that reach the Fourth Moon can expect to enjoy the following key benefits:

1. **Control and Confidence**—Run your business authentically, confident in the knowledge you can choose your own activities—whether business or personal.
2. **Fewer Hours**—Work less if you want.
3. **More Profit**—Earn higher profits.
4. **Reduced Stress**—Feel more relaxed.
5. **Lifestyle**—Create more options for yourself and your family with leverage.
6. **Refreshment and Reinvention**—Breathe new life into your daily routine and refine your life's purpose and meaning.
7. **Multiple Income Streams**—Expand your sources of income.
8. **Greater Wealth**—Increase personal net worth.
9. **Maximization of Business Value**—Receive higher-priced offers if you decide to sell your business.
10. **Succession Planning**—Develop a measured plan for your succession and execute it effectively.

But before you start . . .

As you venture on your initial journey, please don't jump around or rush ahead. Read through the book sequentially to understand the important role that each moon plays in contributing to your ultimate success.

Now let's go.

# COMMITTING TO THE JOURNEY

*Where the senses fail us, reason must step in.*

*—Galileo Galilei*





## CHAPTER 1

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# Houston, We Have a Problem

**B**usiness has always fascinated me. I'm forever drawn to entrepreneurs, captivated by their stories and vision. Each story is unique.

I've worked with small and medium-sized businesses all my life. Drawing on my observations after working with hundreds of businesses, I have indulged my almost insatiable curiosity around the determinants of business success. Many observers get sidetracked by looking at the individual personalities of successful business owners. Of course, these personalities can differ dramatically and often don't illuminate the common, underlying themes of what made their business a success. I will focus here on these owners' disciplines, habits, and techniques within their businesses and in their personal lives.

Styles differ; but I'm interested in substance.

Despite differences in background, age, and even the industry of these successful leaders, the principles of success are amazingly consistent.

Using these time-tested and proven success strategies, I take my clients on a journey to the Fourth Moon. Not literally, of course, but the Fourth Moon

metaphor illustrates how business owners can create sustainable success by visiting the four moons. Each moon represents a stage or milestone reached on this life-changing journey.

## TOM DYLAN'S STORY BEGINS

Tom Dylan had been referred to me by Craig, a long-term client and friend.

Craig was genuinely concerned about Tom. He'd listened patiently to Tom talk about his business, Dylan IT, on many occasions over dinner and at social events. Craig respected Tom's expertise, and knew he had an established customer base; yet Tom always seemed out of control. His business life was full of drama. One crisis followed another. Despite this, Craig believed Tom had what it would take to reach the Fourth Moon.

Craig suggested that Tom begin to work with me. Tom was reluctant to "waste time," as he put it; but eventually he agreed to give me a call and set up an appointment.

Arriving at the offices of Dylan IT, I was promptly directed into Tom's office.

Tom's office was a mess. Paperwork, computer components, gadgets, and folders fought for space on his desk. A laptop computer and coffee mug had won the battle to the top of the pile.

Tom tore his attention from his laptop, looked up anxiously, and greeted me. "Oh, hi." He then looked back down to his computer.

"Hi," I said, standing in front of his desk. "I'm Darren Bourke. You called me for an appointment?"

Tom looked up again. "Of course, have a seat."

I could see that I would never get Tom's full attention, so I just jumped right in.

"To kick things off, Tom, why don't you tell me about Dylan IT?"

Tom ignored my question. He fiddled with his cell phone and glanced sideways at his open laptop, which was pinging loudly as each new email arrived.

"What did you say?"

"I said, why don't you tell me about Dylan IT?"

“Sorry, sorry. What do we do? We provide computer and IT support to businesses. This includes hardware, software, and consulting services with customers in various industries of all different sizes. I guess we try and meet all their needs as their external IT support partner.”

Wow, I thought. That’s a pretty broad offering.

“What about your team? Tell me about them,” I continued, trying to keep him talking while he was focused.

“They’re okay, I guess,” he stammered. “There are twelve employees, excluding me. There are nine IT consultants. They tend to keep to themselves when they’re in the office, but a lot of the time they’re out at customers’ offices. They seem productive, but it’s hard to know because we constantly struggle to get them to complete timesheets, documentation, and invoices. Then there’s Charlie, in Sales. We never know where Charlie is, or what he’s up to. And finally there’s Willy, who looks after Finance, with young Ella helping him in accounts.”

Tom’s assessment of his team wasn’t glowing.

“What about your profitability and trading performance?” I said.

“It pays the bills,” Tom calmly stated. “Look, I don’t exactly know how much we make. I probably should know. We’re always chasing outstanding accounts, and we don’t always invoice customers for everything. It seems like so many things seem to get overlooked or stuck in this office.”

I realized that Tom’s world was less than perfect. He had an established business and loyal customers. But something was missing.

“Tell me, Tom, how do you—”

Before I could finish my question, a staff member burst into Tom’s office unannounced. To my amazement, he launched into detailed discussions with Tom, seemingly oblivious to my presence. Worse still, Tom indulged him, and they spent more than five minutes talking while I sat agog. Tom shook his head, glanced at the mounting emails on his laptop, and scrolled through his phone. He appeared to be operating in a dazed and reactive state.

“How do you market and promote the business, Tom?” I continued, trying to get him back on track.

“Oh, the phone just rings. We have a paid advertisement in the business directory, and some customers refer others.”

“And competitors?”

“There are a couple. The main one would be Peter Perfect. He is always sniffing around my customers and staff.”

“Why do you call him Peter Perfect?”

“Peter’s one of those guys who seems so perfect on the surface. He dresses immaculately, talks a big game, and charms people. But behind that façade there are some dodgy ethics. He hasn’t been caught out yet, but he will be one day. That’s for sure.”

Tom’s face had gone red and his blood pressure appeared to rise just by talking about his competitor.

“What about your profit margins?” I asked.

“We pay our staff and suppliers, and we did make a profit last year.” Tom evaded the question impatiently.

“And how do you lead the team?” I asked, feeling I needed to change stride.

Tom leaned back in his chair proudly. “I try to lead the team. No one here does more hours than me.”

“All right,” I said, acknowledging Tom’s pride in his work. “But who manages the team on an operational, day-to-day basis?”

“I do.”

“It must be challenging to run internal meetings, deal with staff, meet prospects, and attend to management tasks in addition to spending significant hours on-site with customers.”

This statement hung in the air for a few moments.

“Meetings are useless and overrated. Staff see me when they need to. I see customers every day, and the admin, well, it just has to wait. I’m too busy for all that,” Tom stated firmly.

I’d asked enough questions to get a rough idea of the situation.

“I don’t know about you, Tom, but I’m hungry. Why don’t we duck out for a quick bite?”

“Now you’re talking,” Tom said with a wry grin, relaxing for the first time.

As we drove to a nearby restaurant, we chatted about personal matters. Tom was probably in his mid to late thirties. He would have been athletic in his youth, but looked as if he’d fallen into some poor dietary and lifestyle habits since starting the business. Tom was no poster boy for work-life balance.

On the surface, Tom seemed to have a good business. He'd been operating for a number of years and survived. He'd built a team around him from the early start-up days when it was just him, flying solo. He had a number of regular customers. While everything seemed rosy, there were serious issues lying beneath the surface.

We took our seats in the Italian restaurant.

"Forget all the business stuff for a moment," I said. "What about life away from the business?"

"It's not too bad, Darren. I suppose I don't see as much of my wife, Sarah, as I'd like to. I work long days—including some Saturdays—and she hates it when I open up the laptop on the couch in the evening. We never seem to take enough vacations because the business always needs me."

Tom went on to explain that his two kids were growing up way too quickly, and he was concerned his relationships with them were not as close as he desired. Sarah and Tom argued more often than in the past, he said; and with Tom's long work hours, they didn't spend much quality time together these days. Personal friendships had also lapsed due to Tom's demanding workload.

After a glass of wine, Tom confided that he was constantly stressed. He felt there was never enough time, and he had recurring thoughts that he wasn't successful. This endlessly played on his mind and affected his self-esteem.

As we finished our coffee, it was abundantly clear to me that Tom's business and personal life were far from optimal. He simply wasn't happy, and didn't enjoy the rewards and benefits that owning his own business should bring him.

While I'd managed to garner some initial insights about the business and about Tom's outlook, I was keen to get another perspective on the business: the staff's.

I asked him if it would be okay if I came back next week and met with his key people.

"That's fine," he said. "What do you want to speak to them about?"

"I want to get their thoughts and feedback on the business, and their roles within the company," I said, knowing this would reveal a great deal about Dylan IT. "Who are your key people?"

Tom explained there were four key employees. Of the nine IT consultants, he recommended I meet with Jimmy as the most senior consultant,

and Livy as the next most senior. He also suggested I speak with Charlie about sales and Willy about the business's financial position.

So I asked Tom to speak with the four of them—Jimmy, Livy, Charlie, and Willy—about my upcoming visit. It was important that I see them separately and that they speak candidly. To get the most out of my discussions, I requested that Tom ask each of them to be open and honest in giving me feedback.

“You’ll need to be open to constructive feedback yourself,” I told him. “It’s important if we’re going to work together that we have the courage and commitment to tackle the real issues. Are you able to do that?”

Tom paused for a moment. “I guess I’ll have to, if we’re going to get any benefit out of you meeting up with them.”

We scheduled some back-to-back times for me to meet the four key people—Jimmy, Livy, Charlie, and Willy—the following week.

Walking out of Tom’s office, I was left to ponder the potential insights on the business through the eyes of the team. I sensed that Tom’s cautiousness around me meeting the team was based on a fear of what they might say. Perhaps he felt vulnerable about their feedback validating his sense of low self-esteem and perceived lack of success.

Either way, my curiosity would be satisfied in a week’s time. In the meantime, I’d keep an open mind.

## CHAPTER 2

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# Discovery

**A**s I sat patiently in the Dylan IT boardroom, I anticipated meeting Jimmy, Livy, Charlie, and Willy. It was important to get their feedback independent of Tom. I would then attempt to extract the challenges, frustrations, and opportunities the business faced, as well as those the team members faced individually.

Not wanting to be accused later of betraying their confidence, I explained that I would be sharing their feedback with Tom. As Tom was paying me to consult on business improvement, it was only fair and appropriate that I use their input for this purpose. I impressed upon them that their feedback would be used as constructive criticism only. No witch hunts would follow.

First up was Jimmy Operations, the most senior of Tom's IT consultants. After the usual introductions, we got down to business.

I began. "I'm keen to hear your perspective on the business, Jimmy, and in particular on your role in the company."

"Starting with the business, it has so much potential it's not funny. We are technically good at what we do, but we're always in chaos mode; we are



reactive rather than proactive. Tom is so busy he finds it hard to manage the business. Customers bombard him with a heavy workload, and it hijacks him from us. As a result, we don't function well operationally. I hate to say it, but there's a real lack of communication. People tend to do their own thing, which hurts productivity. Lacking supervision, staff unfortunately make mistakes. Customers are regularly frustrated by our mistakes, and by consultants deferring scheduled visits because they've had to return to a previous job to fix a mistake. We just seem to be chasing our tails every day. I feel for Tom, because the business should be doing a lot better."

"Could you please expand on your IT team's operational work? What do they actually do, Jimmy?"

"We generally have projects where customers want hardware and software for their business. Our consultants provide advice on selecting the right solution, supply the hardware and software, and perform installation and training. We also offer IT support afterwards."

"And what about you, Jimmy, in relation to your own role?"

"I'm fairly independent, I guess. I try and help Tom out when he's not around with staff scheduling, customer relations, proposals, and invoicing. I work closely with Livy as well. I understand you're seeing her next. To be frank, my key frustration is a lack of access to Tom. Tom should delegate more. He can be a bit of a control freak. And we're so disorganized. I've suggested we should have regular meetings, but everyone's always too busy. I'm also worried that I'm not developing commercial and management skills like my peers in other companies."

Jimmy Operations expanded on the factors that were crippling the business. His honesty and genuine concern for Tom and the business were admirable. He was clearly talented, but I could see how frustrated and stressed he was by the environment at Dylan IT. Tom could lose him.

After finishing up with Jimmy, Livy Consulting joined me in the boardroom.

I could sense that she had plenty to say.

"I'm frustrated, Darren, by the lack of teamwork. Everyone acts independently. Jimmy and I try to help Tom manage the team better, but he's too busy and distracted with customer issues. We don't have an HR function in the business. Staff appraisals and pay reviews are never held, let alone

training. As a result, overall staff morale is poor—though I hate to say it. I help Tom deal with staff issues when I have time, but I'd like the opportunity to develop some more formal management skills."

Livy Consulting shared similar frustrations to those shared by Jimmy. She, too, had been a loyal team member working hard in the trenches for Tom. I could see in Livy Consulting latent management talent. Her manner was relaxed but assertive. I could envision her supervising a team.

Charlie Sales looked after sales and marketing for the business and was next to join me.

"I don't know where to start, Darren. This business should do much more in sales revenue. Look, I don't know whether it's my fault or Tom's. I joined this business because I love sales and I'm interested in IT. I thought I could make a difference. But it's not working out. I need some direction, but Tom's always busy, and I can never get him to sit down and discuss our sales and marketing strategy. We don't have a plan. I don't have targets. Our pricing policy is unclear. I'm not even sure what our target market is. I've got to tell you, Darren, I'm really struggling."

As he talked, Charlie Sales became visibly emotional. I liked the fact that Charlie Sales cared. I could see his job satisfaction was at an all-time low. He was the Lone Ranger in sales and desperately needed guidance, structure, and support. Despite his emotional state, I could see the magnetic traits of a successful salesman in Charlie Sales.

The last of the key team members to join me was Willy Finance. Willy was responsible for the finance and administration of the business.

"How would you assess the finance area of the business, Willy?" I asked.

"That's a loaded question," Willy said, flashing a nervous smile. "I'd like to say it was in excellent health, but that wouldn't be accurate. Let's just say that Finance and Tom aren't the best of friends. It is impossible to get Tom to look at the figures. I need to sit down with him each week to go through the numbers, but he's never available. As a result, cash flow is constantly a problem. Because Tom doesn't complete timesheets, the consultants get away with incomplete or late time recording. I'd hate to think how much money the business loses as a result of chargeable time not being recorded or billed. Poor Ella in accounts is constantly chasing timesheets so we can invoice."

Willy Finance's frustrations were valid. He had to deal with Tom venting

about cash-flow issues. He also had to take the angry phone calls from customers who received unexpected invoices, and from suppliers chasing unpaid accounts. After calming down a little, Willy Finance went on to explain his desire to help the business grow and to be more commercially involved in the business.

It had been a solid couple of hours spent with the Dylan IT team. Jimmy Operations, Livy Consulting, Charlie Sales, and Willy Finance had provided important insights, which I combined with what I'd learned from Tom during our initial meeting. There was an underlying correlation among everyone's feedback: the business, the key team members, and Tom were all under huge stress; they felt dissatisfied and unrewarded. Operationally, the business was dysfunctional. It was only a matter of time before key team members would break down, and customers would start leaving the business. The future of the business was at risk.

There was no time for timidity or half-truths. I walked into Tom's office and told him that I had completed my discussions with Jimmy Operations, Livy Consulting, Charlie Sales, and Willy Finance. I further explained that I needed to share their feedback and discuss the implications with him while it was fresh in my mind. He agreed. Keen to speak privately, and the morning now behind us, Tom suggested we head off-site for lunch.

Sitting down to lunch, we got straight down to it.

I implored Tom to view the feedback as constructive rather than critical. Owners generally become defensive when confronted with feedback about them individually and about their business. It is human nature for such feedback to go straight to the heart. In my work over the years, I'd observed owners who refused to accept or reflect on feedback from their team or their customers. Where the feedback was valid, this response almost always resulted in the business either closing or facing a long and sustained period of mediocrity.

After getting Tom's assurances that he would take on the team's feedback constructively, I set about sharing the thoughts of Jimmy Operations, Livy Consulting, Charlie Sales, and Willy Finance.

I spoke quietly and slowly. I first took Tom through Jimmy Operations's frustrations in being unable to access Tom. I recounted Jimmy's observations on operational dysfunction, lack of delegation, and overall chaos surrounding the business.

Livy Consulting's observations, I explained, were more focused on

personnel. Livy was frustrated by the lack of systems, support, and general management around staff. As a result, overall staff performance and morale—in Livy’s opinion—were poor.

I paused momentarily to allow Tom to take in this first dose of feedback.

Charlie Sales felt terrible about Dylan IT’s sales performance, and suggested it could be significantly improved. Charlie longed for a clear sales and marketing strategy. He desperately sought clarity on sales targets and pricing policy, and he was racked with self-doubt around his own ability.

I told Tom about Willy Finance’s frustrations in having to deal with constant cash-flow problems. The lack of systems and poor time-recording practices made running the finance and admin side of the business a living nightmare.

Tom tried to constructively process these fresh, yet painful, insights. I could see that it was hard for him. No matter how hard he tried to stay objective, the feedback struck him as personal criticism.

“I must say, Tom, that the sessions I held with Jimmy, Livy, Charlie, and Willy all had the same underlying theme,” I said.

“Yeah, I’m sure they did,” said Tom. “They all said the business sucks, and it’s my fault. I can’t believe that I’ve been so delusional in running the business. I feel like a fool. They must really hate me, don’t they?”

“Quite the contrary,” I said, and paused. “What I meant about the underlying theme in all four sessions was how much they actually *care* about you and the business.”

“Really?” said Tom, lifting his head.

I recounted to Tom the hundreds of team members I’d spoken to individually over many years, and explained the various stages of feelings these team members are likely to go through. First comes frustration. It can be mild or acute. Second comes disengagement. This is where employees reach the conclusion that they can’t change or fix things. They just feel numb. Third come anger and shutdown. This stage can be dangerous, because anger brings volatility, and shutdown represents mental resignation. Team members in shutdown mode may lack care and accountability for their role, without the owner realizing what’s happened. The fourth and final stage is a meltdown or breakdown. Short of a dramatic meltdown, the employee might simply resign without warning.

“So I could lose the team?” Tom suggested.

“Well, yes, you could if you take no action, Tom. But what I said before about how much they cared, I really meant it. The good news is that Jimmy Operations, Livy Consulting, Charlie Sales, and Willy Finance are in the early stages, feeling somewhere between frustration and disengagement. If you address this now, you can stop these feelings of frustration and disengagement from accelerating into anger, or meltdown, and prevent your key people from resigning.”

I wanted to share with Tom some feelings expressed by the team in order to balance their operational feedback.

“Jimmy Operations genuinely feels for you. He expressed concern about the business not performing well for you. His tone was more caring than critical. I honestly believe he cares for the business. He wants to do more to help, but he feels surrounded by chaos.

“Livy Consulting feels for the staff. She wants to help you develop and implement personnel systems around the team. No doubt she possesses the people skills to assist here.

“Charlie Sales was emotional about the sales revenue of the business. With a lack of sales strategy and limited access to you, he feels alone and incompetent. But I saw some attributes in Charlie that we can work with.

“Willy Finance feels the brunt of the operational dysfunction. Remember, he takes the angry calls from suppliers chasing payments. He takes the phone calls from frustrated customers complaining about their fees. Willy has to juggle cash flow, deal with your emotional outbursts, and try to keep the business afloat. It’s a tough gig. Willy desperately seeks organizational structure.

“And what they all want is to help build a great business. They all recognize they have a role to play. They need access to you. They need procedures, systems, and strategies to create rhythm within the business operationally. Jimmy, Livy, and Willy want to develop their management skills—skills that their peers are currently developing in other organizations.”

“I see,” Tom said. “I can understand how they must feel. If I’m to be completely honest, I’ve seen this coming. I just haven’t wanted to. I’ve had neither the capacity nor the courage to face it. By keeping myself so distracted with hands-on work, I’ve been able to hide from the spotlight. Sometimes it takes confronting feedback to finally acknowledge the reality of things.”

Tom's acknowledgment and acceptance of the team's feedback was an epiphany for him. I wanted him to remember this watershed moment. It could be the potential starting point for his transformative journey to the Fourth Moon.

I introduced Galileo's story to Tom, and explained the way he approached his search with patience, open-mindedness, and perseverance. If Tom was to turn around not only the business's fortunes but also his personal life, he, too, would have to adopt these attitudes.

Tom was rather confused at first. I could see him wondering, "What does Galileo have to do with my business?" But as he listened, he became curious, especially when I related the astronomer's patience, open-mindedness, and perseverance to Tom's situation at Dylan IT.

I told Tom that he had already demonstrated an open mind in accepting the observations and feedback from his team. An open mind would still be needed in the future, as the team's feedback was just the tip of the iceberg. Customers, suppliers, his wife, Sarah, and even Tom himself would surely have further insights.

Patience was an attribute Tom would have to adopt from Galileo. Tom's nature was reactive rather than proactive, chaotic rather than planned, sporadic rather than sustained. Tom would surely have to become more patient if his life was going to change dramatically.

Perseverance was not foreign to Tom. He had survived infancy in his business, and had already beaten the odds. He had the work ethic of a diamond miner. However, a new perseverance was required now. The perseverance to play a new game, committed to the actions and disciplines required to create sustainable success.

Tom acknowledged Galileo's attitudes and considered how he could adopt these more successfully in the future. Today's epiphany was still fresh on his mind, although he clearly held some self-doubts around his ability to dig himself out of the cavernous hole he currently found himself in.

I wanted to introduce the story of Galileo's discovery of the four moons of Jupiter to get Tom thinking before my next visit. I recounted the patience, open-mindedness, and perseverance required in order for the astronomer to gaze intently for hours into the night sky.

Tom listened carefully as I spoke of that night in 1610 when Galileo first

observed the moons, just before discovering that they orbited Jupiter. In these moments, Galileo disposed of centuries' of belief in the theory that all heavenly bodies circled Earth. Tom needed a similar revolution in the way he viewed his business.

"I want to talk to you more about these moons next time we meet," I proposed to Tom. "But first I want you to reflect on something. What if I told you that I take clients on a journey to these four moons? Not literally of course, but in a metaphorical sense in which each moon represents a stage or milestone in their journey toward sustainable business success. Curious?"

"Assuming you haven't lost your marbles, it sounds interesting," Tom laughed.

"I haven't been certified yet, Tom!" I joked. "Before we catch up next, I want you to think deeply about the feedback you received today from your team, and about our searching discussions that followed. I want you to think about what you really want to achieve in business and in life. Challenge yourself to consider committing to a journey beyond today's insights. Think about Galileo's open-mindedness, and about his patience and perseverance. You, and only you, can decide if you're up for the challenge of making significant and sustained changes in your life."

Tom would head home tonight full of thoughts, questions, and perhaps some regrets. Sleep would elude him as his mind raced through opportunities, fears, and potential resolutions.