

Life Lessons from a Beloved Mentor

Joe Rotman taught me some of the most important lessons I have ever learned. He rewired brains — including mine.

By *Roger Martin*

ON JANUARY 27, the Rotman School of Management, the University of Toronto, the city of Toronto, the province of Ontario, Canada — and the world — lost a truly great man in **Joseph Louis Rotman**. Joe left an indelible mark on many organizations besides our school, including the **Rotman Research Institute** at Baycrest, **MaRS**, the **Canada Council for the Arts**, **Rise Asset Development**, **Grand Challenges Canada** and the **Ontario Brain Institute**. Some of these he founded; others, he helped to utterly transform. All will miss terribly his ongoing sage influence.

But Joe's impact was also made in a different way — one that will live on as a gift that keeps on giving: he rewired brains, including mine. To quote the famous and grammatically unsound **Apple** ad copy, I 'think different' in the wake of working with Joe for 15 years.

Paradoxically, Joe changed the way I think even though in many ways, we thought very similarly before we ever crossed paths. That became evident to me the first time I met him, for a magical dinner at a restaurant near the Rotman School in May of 1998. It was a few days after the University's Governing Council had officially confirmed me as the incoming Dean, and one of first things then-President **Rob Prichard** said in his call confirming my appointment, was that there was a man who was extremely eager to meet me: the School's new benefactor, Joe Rotman. In keeping with academic custom, Joe was not involved in the search for a Dean in any way, and was kept in the dark about

the process and the candidates until the decision was made. Knowing Joe's personality as I came to, I can only imagine how painful that wait was for him!

Having been a long-time Boston resident and entirely removed from the Toronto *milieu*, I knew very little about Joe as I headed to dinner that night, other than that he was a successful entrepreneur and a philanthropist. I suspect he didn't know much about me, either, because I had very little public profile as a partner at **Monitor**, a rather secretive Boston-based strategy-consulting firm. So probably equally for both of us, it wasn't at all clear how the dinner would go.

We sat down at around 8 pm at a lovely table in the restaurant's outdoor courtyard. After the pleasantries, Joe asked me what I can only describe all these years later as a very 'Rotmanesque' question: if I had a completely blank sheet of paper, how would I redesign an MBA program? Before letting me answer, he further elaborated that I should throw practicality out the window. He wasn't trying to hold me to anything or create a blueprint for the School; he just wondered what my thinking was — unconstrained.

Taking him at his word — which, by the way, turned out to be a universally-applicable assumption with Joe — I told him that I would wipe out entirely the courses then taught in the first half of first year, and instead teach only Philosophy and Physics. My reasoning was that MBA education had become too applied, and graduates didn't understand enough about the basic science of



Joe had a fundamental optimism about mankind that meant there was nothing that couldn't be worked on and improved.

management. For me, Philosophy is the basic science of people and Physics is the basic science of things, and business is nothing but the integration of people and things.

I expected a certain level of shock and horror at such a radical view; but instead, I got enthusiasm — and not because he wanted to be agreeable, but because Joe's mind was in a remarkably similar place. People called him an entrepreneur, but from that point on, I thought of him as more of a business philosopher, and as I grew to know him better, as an organizational theorist.

We talked and talked until around 1 am, when we noticed that there was not a single other diner left in the restaurant and the wait staff was sending subtle clues that it was time for us to wrap things up. That five-hour dinner kicked off a 16-year friendship that could not have been more fulfilling, warm and productive. Even though we often found ourselves thinking so similarly that we felt like the proverbial 'brothers from different mothers', Joe permanently changed my thinking on four important fronts, all of which helped me in my work as Dean and in the rest of my life, and for that I will be forever grateful.

1. Nothing is Undoable

At first blush, the notion that 'nothing is undoable' may hardly seem a lesson for me — a fellow known for tilting at windmills; but Joe taught me important lessons on this front that enhanced my appreciation for the sentiment. For Joe, this was a very important core assumption about the world: 'undoability' was a feature of the present. Right now, countless things aren't being done and hence feel undoable — otherwise, someone would have done them already. He had a fundamental optimism about mankind that meant that there was nothing that couldn't be worked on and improved.

While it might have been unthinkable that the late-1990s Rotman School that Joe and I inherited could ever compete on the same field as the greatest business schools on the planet, Joe's view was that it was doable — improbable, maybe, but doable nonetheless. On that front, one of the sad things about the timing of his death was that he passed away on the same morning that the *Financial Times* released its 2015 global ranking, in which Rotman rose to fourth in the world for the research output of our faculty — ahead of Stanford, MIT Sloan, Columbia, Kellogg, Berkeley-Haas and Michigan-Ross and tied with legendary powerhouse Chicago Booth. Given his deep commitment to research, Joe would have been exceedingly proud and happy. "See Roger?" he would have said to me; "It was doable."

The other piece of his doability equation was equally if not more important: the trap of just working harder. To Joe, things remained undoable if — in the face of the persistence of the status quo — the prescription is to just work harder. He rec-

ognized — probably because of his own indomitable work ethic — that *working harder* would be a natural reaction for many; but instead, Joe always preached *doing things differently*. That is why he enthusiastically supported our School's 'A new way to think' approach, and why his work at Baycrest, Rise and Grand Challenges tacked away from traditional approaches that left desired outcomes feeling pretty undoable.

Thanks to Joe, my default assumption is *doability*, and when things aren't going well, I stop and ask myself if I am just working harder — when I should be imagining other possibilities and approaches.

2. The Intelligent Organization of People is Key to Success

I referred to Joe as an organizational theorist earlier because as I watched him over time, I came increasingly to believe that in his way of thinking, success was a function more of *the intelligent organization of people* than of anything else. Whenever I went to him for advice on an important matter — and I often did — the first thing he would do was examine the human dimensions of the issue: Who thinks what? Who is feeling threatened? What coalition needs to be built? With whom must we start?

As an art lover, Joe was a very visual person, so I imagined that he thought of organizations quite visually and had a graphical depiction of the current organizational dynamics in his head, with boxes and arrows and information flows — alongside another picture of the desired dynamics and a sense of what steps would migrate from the current state to the desired one. Those pictures guided his every move. I would offer up: "I think, we should do X next." And he would say firmly, "No, Roger. We have to do Y first." Then he would patiently explain that if we started with X, there would be a blockage that would be avoided if we started with Y and later moved on to X.

Never was his organizational-dynamics lens more evident to me than when the former leading business school in the country approached me to propose a merger between our two schools, with the resultant combination run by me. My first instinct was to think favourably about the prospects: it was nice that the School we had long trailed (and now surpassed) felt that the optimal way forward was a merger, and I couldn't help but be flattered that they saw me as the right person to run the combined entity.

When I went to Joe and related the proposition to him, he shocked me by being extremely negative about the idea; but not for any of the reasons one might have posited (e.g. 'taking our eye off the ball', 'brand confusion', etc.) "Roger," he said, "They know they have a problem and they think that you are both the problem and the solution. They believe their School is still far superior to ours, and if they only acquire the right leader — you — as

He always asked questions that kept me focused on big, transformative goals.

the result of a merger, their approach, legacy and brand will prevail. It will take them years to internalize the reality that the competitive dynamics of the MBA industry have changed utterly. If you merge with folks who have a status-quo mindset, it is going to be a managerial nightmare for you — and bad for our School.” When he explained it this way, I knew he was absolutely right. I shut down the conversations immediately.

In classic Joe style, it was never mentioned again. There was no: “Roger, remember when I stopped you from making a huge mistake?” But the organizational theorist didn’t have to remind me: I had learned his valuable lesson.

3. Very Little That is Really Good Happens Quickly

Joe was an impatient man. In everything he did, he always wanted to take action and see things change for the better as soon as possible. That characteristic notwithstanding, I did not have a single meeting with him in 15 years in which he either mentioned, imposed or waved over my head a deadline. One might say that in the latter part of our time working together, he trusted that I would deliver and didn’t have to set and enforce deadlines. Fair enough; but it doesn’t explain his behaviour in the first few years of my Deanship, when I had no track record with him.

It started out as a considerable mystery to me: why did this impatient man show such indifference to deadlines? It took awhile, but in due course it became clear to me: while Joe wanted big progress — as fast as possible — he held a very firm view that nothing really good transpires quickly. Big change just plain takes time, and it does not happen on a clear, linear path. So for Joe, setting deadlines that assumed linear progress towards a near-term goal would produce incremental improvement, at best. Furthermore, it would be likely to demoralize the folks attempting to create the kind of transformational change that he sought.

As a consequence, in our meetings he always asked questions that kept me focused on big, transformative goals, and wanted particularly to chat about how I was feeling. If I was feeling positive and he felt that I was focusing on transformative goals, Joe was comfortable. Short-term things would take care of themselves, and he could be confident that his line of inquiry wouldn’t jeopardize the long-term outcome that was so precious to him. This level of restraint was at times awe-inspiring to me, and I have tried to mirror it in my work.

4. Hold People to Their Promises

This was probably the most challenging lesson that I learned from Joe because on this front, we started off miles apart. Joe believed inalterably in *holding people to their promises*, and I didn’t. My approach was to give people a chance to fulfill promises made voluntarily to me; if they didn’t, I assumed that it was because

with the passage of time, either they decided that they couldn’t or they were no longer motivated to fulfill the promise. Pressing them to fulfill it was either tantamount to beating a dead horse in the former case or wasting time attempting to motivate an unwilling soul in the latter. In my view, I was being considerate: no horse beating, no coercion.

Joe thought different. For him, the key issue was not the fulfillment — or not — of the promise. It was what happened afterwards. He saw, 100 per cent correctly, that the reneging pledger would never be asked to fulfill any task of any sort by me in the future, and would get more used to seeing him or herself as someone who reneged on promises — and would probably do so repeatedly in the future. To Joe, aiding and abetting this behaviour was not being considerate, it was the opposite: heartless.

For Joe, insisting on fulfillment was being considerate; providing relief from commitment was not. The former would help others — myself included — trust the pledger and would help the pledger trust him/herself going forward. The latter would seal a negative fate for them. At first, this was counter-intuitive for me; but once considered, the logic was utterly compelling.

In truth, I am still not good at this — and I have a current case staring me in the face. But as a tribute to Joe, I will work on meeting his standard of performance on this front.

In closing

These kinds of insights — and countless others that would take too long to enumerate — will stay with me forever, and I will be a better and more effective person because of them. But there won’t be any more insights — for me or for anybody else, and this aspect of Joe’s legacy is both wonderful and profoundly sad at the same time. In many senses, it is indicative of the legacy of a great man: so wonderful to have had him in our lives; so profoundly sad to have him go. **RM**



Roger Martin is Academic Director of the Martin Prosperity Institute at the Rotman School of Management. He served as Dean of the School from 1998 through 2013 and is ranked #3 on the Thinkers50 list of the world’s most influential management thinkers.