



# Balancing work and personal life: the leader as acrobat

Balancing work  
and personal life

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## Abstract

**Purpose** – The purpose of this paper is to exhort leaders, organizations, and HR professionals to introduce changes in the work structure and environment, as well to pioneer new policies and practices, which allow employees to bring more balance into their lives.

**Design/methodology/approach** – The long-term benefits of balanced work-life are outlined from the research literature as well as the experience of selected business leaders. This is followed by a series of practical exercises designed to help readers achieve work-life balance.

**Findings** – Using the metaphor of an acrobat, this paper provides compelling reasons and proven methodology for leaders and HR professionals to engage more seriously with the topic of work-life balance. How to effectively balance work with personal life is demonstrated through a series of personalized exercises which urge readers to examine their past, present, and future; and then set and implement short- and long-term action plans to reach goals that are linked to their personal values and priorities. The final exercise allows readers to track and measure progress using a Balanced Scorecard.

**Research implications** – This paper highlights the need for a longitudinal research to determine how leaders manage to balance their work and life, and what variables lead to either success or failure.

**Practical implications** – HR professionals must become creative when designing work systems/programs catering for those who prefer more flexibility through supportive organizational cultures and work/job structures.

**Originality/value** – This paper links the theory of work-life balance to implementation of changes in lifestyle through practical individual exercises. It is valuable to both leaders and HR professionals.

**Keywords** Leadership, Quality of life, Balanced scorecard, Family friendly organizations

**Paper type** General review

The best and safest thing is to keep a balance in your life, acknowledge the great powers around us and in us. If you can do that, and live that way, you are really a wise man (Euripides, 480 BC-406 BC).

One of the many skills of an acrobat is to juggle two or more objects in the air at one time by alternately tossing and catching them. Another skill is to be able to walk a tightrope. The skills of an acrobat can provide pivotal learning that today's leaders can use to balance their work and personal life.

The role of leader as an acrobat has two sides:

- (1) handling multiple tasks in a rapidly-changing business environment; and
- (2) balancing work and personal life.

This article will focus on the critical task of walking the tightrope to balance stressful work commitments with a fulfilling personal life.



We observed in the business world some leaders who are quite adept at balancing their work and personal life, and others who are not nearly as skilled. The latter group often ends up suffering from burnout or a poor quality of life, with all the adverse consequences of shaky marriages, weak family relations, poor mental or physical health, lingering bitterness, unfulfilled dreams, regrets, and so on.

Of course, juggling multiple tasks is still important. Henry Mintzberg (1973) was one of the first writers who debunked some of the myths surrounding the traditional managerial tasks at that time. He observed ten managerial roles which depicted more accurately what leaders and managers really do. When examining what leaders do on a day-to-day basis, Mintzberg found that they work on many different tasks at the same time. Their work is frequently interrupted, and does not fit neatly within the traditional managerial functions of planning, organizing, controlling, directing, and so forth. Leaders are constantly in the spotlight while dealing with multiple tasks, handling crises, managing time, and generally organizing their own work and the work of others. If overwhelmed by such work situations, a leader inadvertently sends signals that could be detrimental to the morale of his or her people. We often hear employees complain about their leaders: "He is chaotic, disorganized; unable to multi-task . . . it is a very stressful, frustrating experience."

On the other hand, an effective leader has the ability to keep several "balls in the air" and is keenly aware of the differences between strategic, urgent or immediate tasks with those that can easily be placed on the back burner. An effective leader is competent at identifying, setting, and communicating business priorities – especially during hectic and fast-changing times. This coordination is not always an easy task given the frequent interruptions, crises, meetings, and other "normal" work disruptions and distractions.

### **Balancing work and personal life**

The critical and more difficult task is the leader's ability to effectively balance the time and focus between one's career demands, family pleasures and obligations, and personal life – over a lifetime. Reading autobiographies of recognized business leaders, it becomes clear that the issue of properly balancing work, family, and personal life is an important experience they wished they had managed better, and much earlier.

The term "work-life balance" was first coined over 20 years ago in reaction to the trend of the 1970s and 1980s when men and women began prioritizing work and career goals over family, friends, community affairs, and leisure activities. Today, there is an entire industry dedicated to this field. To get a quick idea of its enormous size, just search the internet for the vast quantity of literature and organizations devoted to this topic.

The topic of work-life balance has tremendous implications for human resource professionals since it affects nearly all functions of HR: from recruitment to retention, advancement, and retirement. The strategies, policies, and programs of the human resource function should take into account the fast-changing demand by employees for a more balanced lifestyle. Certainly, as a pre-requisite, the organizational culture must be supportive of balanced lifestyles for employees. The systems and policies of career development and advancement, succession planning, performance management, work structures, and compensation should also be tailored to those wishing to take sabbaticals, share jobs, work from home, work less hours or on a part-time basis.

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In the past decade or two, HR practices have changed to accommodate more flexible and conducive systems for those who wish to have a more balanced lifestyle (Todd, 2004). However, the question remains as to whether these changes are widespread and whether they include the more challenging senior executive levels in organizations.

There is a plethora of research, surveys, and studies on balancing work and personal life at three levels: individual level (Fletcher, 2002), organizational level (*Harvard Business Review*, 2000) and national and international levels. For example, the research by Gambles *et al.* covered seven diverse countries including the UK and USA (Gambles *et al.*, 2006); the authors represent three generations of women who have been experiencing the challenges of work-life integration over a period spanning 50 years. They wrote: "Difficulties men and women experience in combining paid work with other parts of life can no longer be considered as purely personal, family, employer or even national concerns. They are global challenges." The work by Fine-Davis *et al.* compared the national, social, and workplace policies as they relate to work-life balance issues in France, Italy, Denmark, and Ireland (Fine-Davis *et al.*, 2004).

In the UK, the most prominent and ongoing research on work and health is known as the Whitehall Study. The initial study, or Whitehall I, found lower employment grades, and thus status, were clearly associated with greater propensities for significant risk factors, including obesity, smoking, reduced leisure time and physical activity, more baseline illness, and higher blood pressure.

The second phase, Whitehall Study II, is a longitudinal study of 10,308 women and men all of whom were employed in the London offices of the British Civil Service; it investigated the relationships between work, stress, and health (CCSU/Cabinet Office, 2004). Whitehall II found that the way work is organized, the work climate, social influences outside work, influences from early life, in addition to health behaviors all contribute to the social gradient in health. Most pertinent to our article is the finding that stresses from conflicting work and family demands result in poor health. Whitehall II suggests that, "both work-to-family conflict and family-to-work conflict affect the mental and physical health of men and women. Furthermore, the deleterious effect of both types of conflict on mental health can be observed in diverse countries such as Finland and Japan." The policy implications of the study indicate that a better work-life balance may help reduce stresses between the conflicting demands of work and family roles. The recommendations of Whitehall II in regards to balancing work and personal life were:

- "Maximizing time spent at home through flexible working hours.
- Better leave arrangements for caring for children and the elderly.
- Reducing work-related commuting through encouraging work at home."

Of course, working at home has long been seen as a privilege for employees who can and want to better balance their work and personal lives. Fortunately for the very few, more employers are allowing some employees to work from home, when it makes good business sense. The virtual workforce is, perhaps, becoming the new phenomenon of the twenty-first century in our wireless, worldwide web of networking.

A recent Wall Street Journal Online report (Wall Street Journal Online, 2007) is illustrative of the new trend calling for a more balanced work-life. A group of law students from across the USA formed a new organization (Law Students Building a Better Legal Profession) whose objective is "ensuring that practicing law does not mean giving up a

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commitment to family, community, and dedicated service to clients.” They e-mailed hiring partners and recruiting coordinators at the country’s biggest law firms asking them to sign-on to principles espousing a saner work environment for lawyers. The law students explained: “We recognize that changes in work structures come with an economic cost, and we are willing to be paid less in exchange for a better working life.”

Finally, the costs of balancing work and life for many employers and employees are escalating in terms of health care, retention, productivity, safety and mistakes at work, and personal satisfaction (Glinsky *et al.*, 2001). For instance, employees who feel overworked experience less success in their relationships with spouses, children, and friends; they also experience more stress, sleep deprivation, impaired job performance, and feel generally less mentally and physically healthy. According to the World Health Organization, mental health problems due to work pressure are expected to become the second most common cause of disability and death by 2020 (Harnois and Gabriel, 2000).

This article will not address important topics like day-care centers, company benefits to free up employees’ time, flexible time, paternal leave policies, and so forth. We also will avoid suggesting quick fix solutions that promise to dramatically alter a leader’s mindset because we all know that such solutions are typically not sustainable. Instead, we will be urging readers to make significant shifts in personal values and priorities over a period of time; such shifts would eventually translate into substantive trade-offs and changes in lifestyle, better health, and success both at work and at home. It is critical to realize that such shifts are choices that one makes as he or she becomes older; thus a younger couple may chose working hard until their children reach a certain age, after which they will again chose to slow down and give up some of their earning power in order to spend more time with their family and community.

Of course, in the short run, balancing one’s life will be different depending on the person’s occupation: for example, a traveling sales representative or a leader of a global company will have a built-in job requirement to travel extensively. A local restaurant owner, on the other hand, will not travel extensively but will typically work long, odd hours. A single parent executive will have to constantly cope with double the normal burdens (which became less problematic with child care centers). Still, each will have to work hard in their own way in order to balance work and personal life both in the short and long run. Every one of those people will still have to be a skilled acrobat when shifts in values and priorities are made.

No matter what profession a person is in, or how old a person is, it is never too late to re-evaluate and re-think one’s lifestyle. Along with your significant other or spouse, take a few moments to ask yourself: “Do I find myself suffering from occasional stress, depression, frustration, and guilt feelings about how I spend my time? Am I or my significant others happy with our accomplishments so far in our life? Are there any regrets? Are there any un-fulfilled hopes and dreams? What constitutes happiness for me and my loved ones?” Whatever your answers, now is the time to think about balancing your future lifestyle.

We will start at the individual level with a brief discussion of “why” it is essential to have a balanced lifestyle, and later will elaborate on some of the “how to do it” tools, presented in this article as a series of exercises.. Readers are encouraged to participate in these practical and personal exercises in order to derive the maximum benefits from the research mentioned in this article. We will end with recommendations and implications for future HR practice and research.

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### The necessity of proper balancing

The need to balance one's work and personal life can be attempted at any point in one's career, from graduation through retirement. Undoubtedly, the earlier in life this is done, the more likely that a person can enjoy the full pleasures of relationships, spirituality, health, success, and whatever else is valued.

In the leadership literature today there are several pertinent examples that drive home this point. In a chapter titled "Developing Three-Dimensional Leaders", James Bolt, a consultant specializing in executive education, advocates a three-dimensional framework (business, leadership, and personal) for developing future leaders (Bolt, 1996). Bolt states:

The personal dimension is based on the belief that individuals cannot be effective leaders if they are ineffectual in their personal lives . . . The personal dimension concentrates on helping to clarify and develop the individual's purpose, vision, values, and talents to integrate work goals and priorities into his or her personal life. Other topics should include self-empowerment and personal responsibility; an appreciation of nature, science, the arts, and the humanities; emotional and physical well-being; and the development of continuous-learning mind-set.

*Chasing Daylight* (O'Kelly, 2006) is a remarkable book written by the former Chairman and CEO of KPMG, when he learned at the age of 53 that he had three to six months to live as a result of a late-stage brain cancer. Eugene O'Kelly wrote:

I had always been a great believer in commitment, in every aspect of life that mattered to me . . . Unfortunately, though, commitment, particularly in the business world, had come to equal time. Too often, your commitment was routinely measured by how many hours you were willing to work. By how much time you would take from your family . . . If you did not give so much time, then by definition your level of commitment was suspect. Time alone was the bellwether.

A few days before he passed away, O'Kelly wrote:

I like to think that I did a good job back when I was healthy. But had I known then what I know now, maybe I would have made a better executive. Almost certainly I would have been more creative in figuring out a way to live a more balanced life, to spend more time with my family. I always assumed you had to physically separate them. Home was home; the office the office. My thinking had been too narrow, my boundaries too strict.

O'Kelly's book is not full of regrets; on the contrary he chronicles his final journey that was not only balanced but was full of "perfect" moments and "perfect" days. He wrote towards the end:

I have marveled at how many Perfect Moments I was having now. I was getting better at it. It was beautiful. And as much as I had loved the hustle and bustle of my previous life, I couldn't help but think back on how rare such moments had been, and how plentiful they are now . . . In my previous life, the one where I couldn't have told you with certainty the year I would die, such spontaneous beauty happened rarely. Or I guess I was too busy to be open to it.

In his latest book, Jack Welch (2005), who admits that he is not an authority on work-life balance, wrote one chapter entitled "Work-Life Balance". In it he notes:

. . . looking back, it is clear that the balance I chose had consequences for the people around me at home and at the office. For instance, my kids were raised, largely alone, by their mother, Carolyn.

He goes on to observe:

If you don't fulfill your own joy with your work-life plan, one day you'll wake up in a special kind of hell, where everyone is happy but you".

In a more recent column in *Business Week* (November 27, 2006), Jack and his wife Suzy Welch advised readers:

Balance, we're saying, is a personal choice based on what feels right to you given what you want from life personally and professionally. With that choice comes consequences . . . There's no right or wrong here. There are just individual choices and their trade-offs.

In a recent book by Bill George and Peter Sims (2007), they describe how one can develop as an authentic leader. The authors suggest working on five key areas:

- (1) knowing your authentic self;
- (2) practicing your values and leadership principles;
- (3) understanding your motivations;
- (4) building your support team; and
- (5) staying grounded by integrating all aspects of your life.

It is the fifth key area that relates directly to our subject. Here, the authors call for leaders to strive for an "integrated life" that augments work with family, friends, community service, spiritual activities, physical exercise, and whatever else matters in one's life.

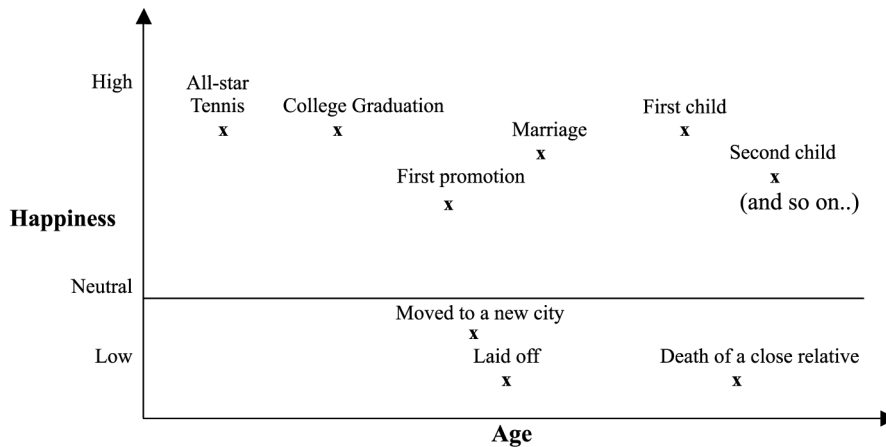
### **How to effectively balance work with personal life**

#### *Know thyself*

To change your lifestyle and to balance work and personal life, you need to first analyze and appreciate both the past and the present. It would be beneficial to involve your spouse or partner in the soul searching questions and in the future planning that follows. The tools used in the remainder of this article were designed as a series of exercises to help leaders balance their work and personal life (Muna, 2003). They were used with hundreds of participants attending retirement planning seminars. The feedback was overwhelmingly positive, thus encouraging us to write this article. We urge you to actively participate by using these tools where indicated; you may need several sheets of paper.

We will start this journey by visiting the past. But it is important to remember this: *Visit the past; but don't live in the past, and definitely don't dwell on it!* The first exercise can be used to put your life in perspective, and to better understand and appreciate the past, the present and the future. First, list your major life events starting from early childhood to the present day. Now plot these events on a graph, where one axis indicates your degrees of happiness and the other axis indicates age. Be sure to include all significant events (happy, indifferent, or sad), as shown in a hypothetical example (Figure 1) (you may need more than one page).

This exercise and the others to follow will give you the perspective you need to start thinking of the future. It will also make you more aware of the possibilities that experienced leaders and researchers have recommended on the subject of work-life balance. Next, ask yourself (and your spouse) what will make you happy in the next ten, 20, or 40 years. Start by asking the following questions: What meaningful activities will fulfill some of my/our goals and unmet needs? What would my family and friends



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Figure 1.

expect from me/us? To help you answer the above questions, start by completing a long-term *Wish List*. For example, which countries have you always dreamt of visiting but didn't have time or money to do so? What hobbies or interests have you always wished to engage in but were unable to do for some reason or another? What career or profession has always appealed to you, but for some reasons were not able to pursue? Did you ever wish that you had taken a major at university that is completely different from the one you actually selected? To be more dramatic and extreme, ask yourself: what would I wish to do if my doctors tell me that I have a very limited time left on this earth? And, finally, how would I like people to remember me after I am gone?

Be careful, however; do not use the past as an excuse. As novelist Paulo Coelho (2005) once wrote: "It is always important to know when something has reached its end ... what matters is to leave in the past those moments in life that are over." It is not helpful to make yourself a victim of past events. The past is gone; so don't cry over spilt milk. Instead, *think positive* and always think about a brighter future.

### *Future planning*

It is helpful at this point to draw five, six, or more circles each representing the *value* you place on work, family, personal life (includes spiritual, intellectual, and physical), friends, community, and so on. The size of each circle should represent the time and energy which you are *now* spending on each. Are your circles of the same size? How big is the overlap, if any? Is there balance or imbalance? Are your current priorities and values in line with the energy and time you are devoting to each circle? Are you overlooking any other aspect of your life? What will you like to do about all of the above in the coming years? And most significantly, do you have the freedom and motivation to start changing the size of the circles in order to balance your life? Figure 2 shows two over-simplified sets of circles depicting values for a hypothetical person who will be retiring in five to ten years.

Notice that work (part time or volunteer) for this particular person will become the smallest circle, while family, friends, finance, and health will become more significant. Keeping in mind that with age one's priorities and values may change, draw circles

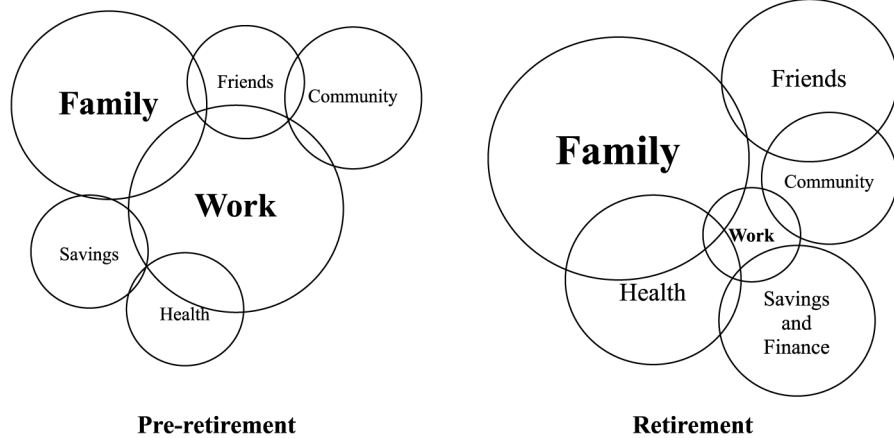


Figure 2.

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that best represent your current priorities and values and another set of circles which represent your desired priorities and value, say, five to ten years from now.

Next, write down the answers to the following questions: What are my future goals? What are my strengths and weaknesses? How will I take advantage of my strengths and work on my weaknesses? What threats and opportunities do I face now, and in the foreseeable future? What will make me/us happier? What do I/we want to accomplish during the rest of life? Looking forward, describe what your life looks today and what you expect your life to look like ten, 20, and perhaps 30 years from now. In short, what is your vision statement or Statement of Purpose? Write a draft of your own Statement of Purpose (in one or two paragraphs); see the example below:

An example of a Statement of Purpose for the hypothetical person who will be retiring soon:

My aim is to build and enjoy strong and meaningful relationships with my *family* and *friends*, while taking active roles in my *community* and *profession*.

To accomplish this, I shall do everything in my power to manage my *savings* and to look after my *health* (mental and physical) for as long as possible.

Notice that each circle (*value*) shown in Figure 2 became a main part of the Statement.

#### *Setting, implementing and keeping score of future plans*

So far you have collected three types of data: you have looked back at the major events of your life, examined changes in your values and beliefs over time, and asked a number of serious questions about the future. These are the raw data that can help you to balance your life from this day forward. When summarized, you will end up with: priorities/values; a wish list; and; a Statement of Purpose, that when integrated, will be used as guidelines for your future plans of a more balanced work-life.

Next, take each one of the main values (extracted from the Statement of Purpose) and ask yourself: How can each value be satisfied over the years to come? For example, the above hypothetical person who is retiring soon has six values:

- (1) family;
- (2) friends;
- (3) health;
- (4) finance;
- (5) community; and
- (6) work.

These values appeared above as six overlapping circles, and in italics in the Statement of Purpose. By asking repeatedly “how” and “how else” each value can be implemented, you may end up with many action plans, some for implementation within a year, others for future years.

The following are a few examples of possible future plans (for the *family* and *friends* values) that could emerge from repeatedly asking “how” to fulfill or action each value:

- ensure that you and your spouse go out every week to dinners, theaters, sport events, etc;
- arrange to visit with children and grandchildren (if any) at least six times per year;
- visit extended family members at least once a year;
- reconcile or re-connect with a long-lost relative or friend in the next year;
- organize a reunion for the extended family every four years, at different location for each reunion; and
- organize a reunion with high school or university friends every five years.

These are short- and long-term plans that need implementation in the two areas of family and friends. One can imagine the large number of specific action plans generated when all five, six, or more values are agreed and written down.

It is time now to keep score of progress through a Balanced Scorecard; this will be the final exercise. A Balanced Scorecard (Kaplan and Norton, 1996) will help track and measure your progress in implementing every single future plan for each set of values. The Scorecard should be reviewed frequently; for example, monthly when it comes to the budget, or to-do list; and perhaps quarterly and semi-annually for the other activities.

The original Balanced Scorecard, designed for corporations by Robert Kaplan and David Norton, has four perspectives: financial; customers; learning and growth; and processes. In this article, however, we shall use the term Constituents instead of Customers to refer to those people we interact with such as spouse, children, extended family, friends, community, and so forth.

Figure 3 shows a Balanced Scorecard covering the four perspectives: it captures all of the six values that appeared in the hypothetical Statement of Purpose of this would-be retiree. It also shows the sub-categories of each value that the retiree should be measuring and keeping score of:

The following are the types of questions one should be asking in order to measure progress in each perspective:

- *Financial perspective*: How well are my savings efforts and investment portfolio doing compared to planned targets? Are my expenses on target compared to my budget?

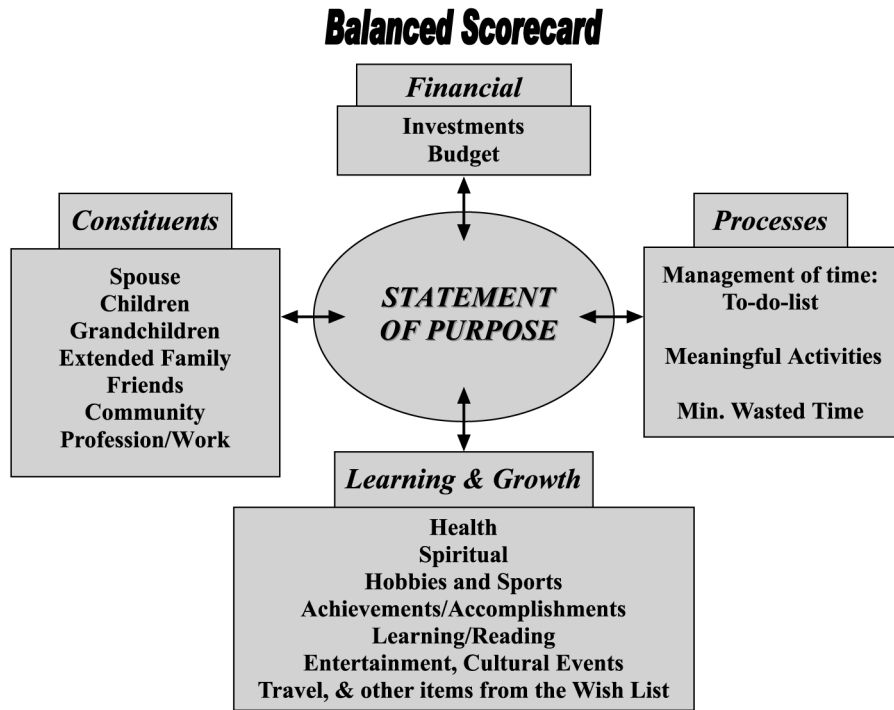


Figure 3.

- *Constituents' perspective:* Am I on target on each of the planned specific activities devoted to enriching my relationships with my spouse/partner, children and grandchildren? Are these activities creating better quality time? Am I on target on each of the planned activities devoted to enriching relationships with my friends? What is the nature and frequency of my involvement in community or charitable activities?
- *Learning and growth perspective:* What is the frequency and quality of entertainment, spiritual/cultural events, and travel? What is the best kind of physical exercise and activity for me?
- *Process perspective:* How well is my time managed, as judged by surplus time, wasted time, or boredom? How many planned activities have I postponed or cancelled, due to poor utilization of time?

As in all planning, it is always essential to set measurable, realistic, and time-frame goals. Here are some specific examples: spend less time watching TV by skipping it three or four evenings a week, reading more and spending time with friends. Adhere to the recommended physical fitness plans. Get together with extended family members twice this year. Engage in a new charitable or community activity during the last quarter of this year. Visit Italy during your summer vacation two years from now.

Let us end with a crucial reminder: one needs to measure progress and re-evaluate the entire process from time to time. Priorities, values, and circumstances will change over

time, and one needs to reassess the whole thinking and planning process whenever any major changes occur. If nothing else, these periodic updates and reviews raise a person's awareness level and serve as constant reminders to seek a more balanced life.

### **Implications for future HR research and practice**

Work-life balance is becoming a priority for an increasing number of senior executives, and particularly so for women executives (Vinnicombe and Bank, 2003) who are faced with unique challenges. Providing an environment where work-life issues are taken seriously is the newest challenge for both leaders and HR professionals. We believe that future research and practices should start to address the following specific areas:

- Balancing work and personal life is a dynamic and gradual process; it differs from one individual to the other; and thus is not easily replicated. Therefore, longitudinal research is desperately needed to determine how leaders manage to balance their work and life, and what variables lead to either success or failure. For such a research, a representative sample can be drawn from executives attending work-life balance workshops and/or other executives contemplating changes in their lifestyle. It would also be helpful to conduct empirical research to explore whether leaders do consider themselves as acrobats, and if so, how they cope with this role.
- HR professionals must become creative when designing work systems and HR programs in the following areas: Flexible recruitment practices that attract potential leaders who may opt for non-traditional work styles; career development and advancement opportunities for those employees who choose a more balanced life; non-punitive compensation packages catering to those who prefer more flexibility; supportive organizational cultures, and innovative work/job structures that reward those leaders who are trying to make transitions and choices that will gradually lead to greater balance between work and personal life.
- HR professionals should devote more energy and time to designing and promoting training workshops and seminars that specifically address work-life balance issues, coaching and counseling, as well as the non-financial elements of retirement planning, in organizations whose cultures support a more balanced lifestyle. Both leaders and HR practitioners could be powerful role models leading the change in organizations whose cultures are lukewarm about better work-life balance.

### **Closing remarks**

What is particularly ironic about this subject is that most leaders are proficient in effectively planning how to address short and long-term issues in their business, but they spend precious little energy on planning or executing actions that would improve their personal lives.

In today's global and competitive business environment, we acknowledge that it is often difficult for leaders to better balance their personal lives if they believe that this entails a risk of potentially losing a significant edge over others, either from within or from outside their organizations.

Additionally, leaders tend to completely avoid or perhaps defer this balancing process until one more objective or goal is fulfilled. For example, "I'll work on

balancing after I get my promotion”, or “after I complete these major projects.” There will always be an ample supply of excuses for procrastination.

When dealing with this ever-changing balancing act, effective leaders realize that success in the workplace and a fulfilling personal life are not mutually exclusive. The two can and should effectively co-exist in a complementary manner.

Over the years, we have spoken with many senior executives who are nearing or are in retirement. To this day, we have yet to find a single executive who wished that he or she had spent more time at work. On the contrary, the most common thread was their regret of sacrificing their family, friends, and health in favor of dedicating a significantly disproportionate amount of effort and time to demanding work responsibilities.

We hope that this article, and the tools covered, would be a catalyst in starting a major thrust for balancing work and personal life among leaders in organizations. We also hope that readers of this article who have taken the time to go through each exercise discussed above are encouraged to repeat these exercises at least once every few years. Finally, it is far better to gradually bring more balance into one’s life now instead of doing so abruptly just before retirement. Many people may eventually realize that this saying has a lot of truth: Work to live. Don’t live to work.

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### Further reading

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