

## Episode 103: The Power of Transferable Skills—with Kathy Alexis

Deb Zahn: Hi, I want to welcome you to this week's episode of the Craft of Consulting Podcast. So on this show, we're going to talk about transferring skills from one area of work to a completely different one and how easy that can be if you do it right and you do it thoughtfully. So I bring on Kathy Alexis who is currently still a quality improvement expert that works with healthcare providers to help them improve the outcomes for their patients. And then she's also a financial consultant where she works with individuals on improving their finances. And those are two drastically different things and yet she transfers skills back and forth between the two of those to be successful in both areas. So we have a great time talking. Let's get started. Hi, I want to welcome my guest today, Kathy Alexis. Kathy, welcome to the show.

Kathy Alexis: Hi Deb. Thank you so much for having me.

Deb Zahn: So let's start off. We're going to tell people how we know each other, but let's start off, tell my listeners what you do.

Kathy Alexis: So I am an independent financial consultant for a company helping people to improve their credit score and aspire to reach their dreams. So whether that's buying a house, buying a car, or just being able to sleep at night because you're able to pay your bills, that's what I'm hoping to help people do.

Deb Zahn: That's wonderful. You and I have known each other, I don't even know how long. It's over 10 years for sure.

Kathy Alexis: Definitely over 10 years. Absolutely.

Deb Zahn: And you worked at one of my first clients ever. And so that's how we met and then became friends. And then I tried to harangue you into taking a kitten or more.

Kathy Alexis: With my allergies, you still tried.

Deb Zahn: I'm like, "It'll be fine, don't worry about it." And was I right? Because you got cats.

Kathy Alexis: You were. I finally got two cats and after a couple of months of dealing with sneezing, it was OK. It just went away.

Deb Zahn: See, I'm an honest consultant, including a cat consultant. But you've also been on this amazing journey in your life since we knew each other. Since we met and you stopped working for the organization that I was doing some consulting for. And that's what I thought it'd be helpful to talk about today. Because one, when you told me I was so inspired because, I mean, wherever you've landed and what you've been through is just so incredible. And so many of us deal with tough things. I think it's important to be able to share that, but also because you've done this amazing thing where you've taken skills that are seemingly in unrelated fields and you've been able to apply them so that you can be successful in a few different areas and not just sort of where you started from.

And I think that's so incredible and helpful for people to hear. So from when you left the organization where I worked in and the path that led you to become a financial consultant and trying to help people with the money part of their lives, what did that journey look like? How did you end up there?

Kathy Alexis: I have to start by saying it was a personal development for myself. A few years back, I went through a near-death experience. I told you I had a pulmonary embolism.

Deb Zahn: Wow.

Kathy Alexis: One day I was perfectly fine, and the next day I was in the hospital. They told me, "You can't move because if you do, you may die." And so going through that experience, I spent some time really taking a look at where my life is and if I was to die that day, would I have been happy? Would I have been content with where I left things?

So going through that process of just kind of looking at what my life was and what could have been, I went through a point of depression that you don't really talk to. I actually was talking to a friend of mine the other day, and she says I didn't exhibit the clear signs of someone going through depression. I didn't exhibit the sadness, the withdrawal, all those other signs that they say you're supposed to look out for. Instead, I was going out with friends and I was smiling, and I was laughing. I went to work every day. I did everything that I was supposed to do, but I still carry that cloud around me.

When I finally realized that something needed to change, I sought therapy, and I was able to really work through that. And one of the things that my therapist said was, "What are those things that you enjoy doing? Go back to your childhood. What is that thing that you really enjoy doing?" And I said, "One of the things I really enjoyed doing was dancing, right?"

Deb Zahn: Nice.

Kathy Alexis: So I went and took a dance class, which was really great. But another thing that I really enjoyed doing is helping people. And I've always been told that I was good with money so I said let me look into this and see how I can help people.

Deb Zahn: And what are the common things? I mean, I imagine it's been exacerbated by COVID, but what are the common things that you see in terms of people struggling with the money side? What does that often look like?

Kathy Alexis: First of all, it's denial. I think there's a lot of denial there. And I think that denial really has to do with lack of knowledge and not feeling confident in yourself to be able to deal with the situation and deal with it head-on. I think that's one thing. I think there's a sense of embarrassment and shame to not want to tell other people that you are struggling with finances, especially if you are part of a community. Let's say if you live in a wealthy community or your children go to a really good school or something like that. You're supposed to carry on an air that everything is great, right? But you're not really letting people know that things really aren't that great and especially financially I need some help or my credit score is not great or I can't afford certain things. And so I have to say the biggest deal is that embarrassment dealing with your finances.

Deb Zahn: Which is similar to what you were talking about a moment ago. The same thing happens with depression. The same things happen with anxiety or other types of mental health issues that people struggle with. I've certainly had depression. I'm more of what we call the "anxiety variety." But it's embarrassing because that's not what you're supposed to bring to your life, to the professional world. So you kind of hide it and then you add finances to that. Or finances are the big thing, and it gets even trickier to be willing to talk about these things out loud.

Kathy Alexis: That's right. And for that period of time, even though I was having fun with my friends and going to work, I didn't pay my bills. I didn't pick up my mail. I didn't pay anything. I kind of let a lot of that go. I was good to know that there are certain things you should have automatic, right? Automatic...

Deb Zahn: Thank goodness for those.

Kathy Alexis: My mortgage was automatically paid. So that was the first thing that came through the mail and then I had to actually write a check, who does that these days? Or actually send something out. I didn't really pay those. And so that kind of led me into a place where my credit score was a little bit...I needed some help.

Deb Zahn: Oh, absolutely. And you know how common it is, partly because you have these credit card companies who are just tossing offers at you. My first credit card offer was when I was 18 because they had booths lined up when I first went to college and they were offering us credit limits of \$10,000 \$15,000, \$20,000 for 18, 19, 20 year old. Nobody taught me that I should not max that out. So when I went to Mexico and I learned how to say, "¿Aceptas tarjetas de crédito?" that was the main thing I said over and over. And it worked. But I think it's what underlines your experience from what we talked about. And then also some of the folks that you work with is that it's hidden. There might be some shame attached to it. Some embarrassment attached to it. So how do you get folks to be willing to get past that?

Kathy Alexis: Well, you know me Dab. I'm more of a relationship builder.

Deb Zahn: Oh yeah. I do know that.

Kathy Alexis: I'm not a salesperson. I'm not going to pretend to say that I am. I'm not the type of person to convince you to do something, but I do want to talk to you and kind of learn about what's going on. And I think to build that relationship is really important because it is a sensitive issue. A lot of people will tell you, I don't like to talk about my finances with family or friends because in any relationship, whether it'd be a marriage, a romantic relationship, friendship, money tends to be a really tricky subject within those relationships.

So I have a hard time talking about money within my relationships, but I do think that if you come to that conversation with a sense of humility and honesty, I think that can open up the doors to real authentic conversations about that. And that's really how I try to approach people. And I really want to understand where people are coming from. That really helps a lot. Like I said earlier, just pure honesty. I'm not going to say that I can do something or promise that I can do something that I don't know whether I can and so I do approach every situation with full honesty and hopefully that will allow customers to really open their door, open their heart.

Deb Zahn: That's right. And what's interesting, as you're talking about individuals, but you know it applies to companies. It applies is definitely small businesses, but also larger companies. It applies to organizations that are having some money woes or something big and bad happened, and they weren't paying attention. So that type of honesty and empathy and everything you bring to it, any consultant who's working with organizations that might be having some struggles, whether it's money operations, something else, that's so helpful. Now, where did you get that? Because I've known you for a long time, I know you are a people person. But those are very particular skills to get people willing to surface things that are difficult. Where do you think that came from?

Kathy Alexis: Wow. I don't know. I would love to say that is from family, but I'm an only child.

Deb Zahn: So your mom and dad must love that.

Kathy Alexis: Yeah, exactly. But so maybe I can say that it's because I talked to my invisible friends a lot...

Deb Zahn: And then there you go. Who were struggling, clearly.

Kathy Alexis: Exactly. But I really don't know. I think in my family, I am kind of the peacemaker, I think. And I really talk to people. And I think for me personally, I understand that everyone has their struggles and what you see on the exterior is not really what's going on behind those doors. Right? And I have a true understanding of that. And a lot of people say that you can't judge a book by its cover, and I think it's something that we all do very easily, whether we want to admit it or not. I think we do that very easily. But I think you have to consciously say, I'm going to get to know someone...at least have a conversation with somebody so you can understand where they're coming from or what's going on. I can't tell you where I got that from, I can just say that that's how I know to be. And I can't be anything else but that.

Deb Zahn: It's a wonderful thing to be. I knew you when you were doing or still doing quality improvement work in healthcare settings. So that seems wildly different than doing financial consulting, but it kind of isn't because it's still people in systems and struggles and shame and all of that stuff boiled in. So when you think about that work, what are some of the skills that you're bringing or knowledge you're bringing from your quality improvement work in healthcare settings and with docs and with nurses and administrators over to now working with individuals on their finances?

Kathy Alexis: Well, I have to tell you, for me, it really started back in my days as a health educator. I tell everybody I am a health educator at heart.

Deb Zahn: Yeah.

Kathy Alexis: And that's what I got my Master's in, in community health education. I think that talks to the fact that I enjoy speaking to communities. I like to have a sit-down small group conversation with people and just really get folks talking to each other. That's where my career started and I think that's where my real interest level in talking to people started. And then I went into quality improvement and quality improvement in healthcare is really all about, again, working with teams, working with individuals, working with organizations on improving their system of care to patients. Again, got to build relationships. You have to feel comfortable going to that doc who's the chief of whatever department-

Deb Zahn: And possibly the world.

Kathy Alexis: ...And possibly the world, exactly. And say, "There are a couple of guidelines that you guys are not adhering to, let's work on that." Really being comfortable in my shoes to be able to go in front of a group of people who may know, well, who do know a lot more than I do about a certain field, but I'm always willing to learn and I'm always willing to take something out of every situation. And I think being able to sit down in that field, in the healthcare field...And then along with quality improvement, I've also done project management. So project management is really being able to look at the needs of a system, whether it's the community or the organization, and identify the gaps and identify what needs to be done to address those gaps.

And who do you need to bring into the circle to help you address those gaps with that organization, that's life. That's really what it is. And it's no different with financial consulting where I can sit down, and I can talk to a client about what's going on. I can bring the expertise that I have. I have mentors that I can talk to and bring expertise from them, also. Figure out what's going on or what's not going on and we'll fix it together. So there's no real difference, but that's really where the skill lies, being open to doing all those things.

Deb Zahn: Well and then fix it together. So this is what I remember about you and this is why you were so good at what you do is, so people didn't feel defensive, which they often do, by the way. So if folks can just imagine...you're a physician, you're a nurse, or you're someone in a healthcare setting and your desire is to help people and that's your self-identity is that you are the helper. And then someone shows up who says, "Well, you need to be doing it better. Your patients with diabetes aren't quite getting the results that they need." That's a hit for who you are as a person. And I know from my younger days of having credit cards no one should have given me, that's a hit to your identity as a grown person who knows how to take care of their stuff. You were really good at helping people understand that it doesn't diminish them to ask for help. It doesn't diminish them to get help, and I was always so impressed with how you did that.

Kathy Alexis: Thank you. I appreciate that. I love helping people so it doesn't hurt. And I love talking to people at different levels. I remember there was a time working in the community, it was a community doc who had a receptionist. Everyone in the community called her Mama. Yeah, I know Mama was great. Mama knew everyone in the neighborhood. She knew what was going on with them and their grandchildren. She knew what each patient needed, and I knew that I needed to know Mama and bringing Mama into the fold to help this doctor really help his patients. That's part of that knowledge of knowing who you need to bring into the circle, right? And if you don't take care of the people who are on the front lines, you're not going to really address the issue.

That's what I say in healthcare and that's what I say in financial consulting. It's kind of in a marriage situation. If you don't take care of yourself, if you don't bring your spouse if that's possible into the conversation about what's going on with your finances, you're not going to really address it. So it's important to bring those people in.

Deb Zahn: That's right. In the surface what's really going on instead of hiding it.

Kathy Alexis: That's right. Well, I don't want to say I'll be a therapist because I can't do the therapy part, but really start those conversations. Start kind of thinking about what sort of conversations they should have.

Deb Zahn: And I imagine in both of those worlds that you're from both the quality improvement in healthcare, as well as the financial, at some point people start to relapse or they start to feel resistant. And part of what I know that you do very well is push people, enable them to get past that. And not in a way that makes them feel bad, but in a way that makes them feel like they're actually taking the steps they want to take. What does that often look like in terms of what skills you're actually applying to get people to move past it? And if you have a sort of story because you're not sure the words for it, feel free to describe it that way.

Kathy Alexis: I would say what's really important for me—and I learned this as a quality improvement professional—is that you have to meet people where they are, right? You can't just knock on the door and say, “Hey. I'm doing this skill and I'm providing this service and jump on and let's do it,” and it'll be great.

Deb Zahn: Go, go, go, go, go.

Kathy Alexis: Let's go get it. It's not going to happen that way because not everyone is going to be at that same space. And so I can say that I know someone who has been working on their finances for years, have paid other consultants money monthly to work on their finances, and they have not received any other results that they were looking for. And at some point, they just kind of gave up and just said, “This is what my life is going to be, and I'm not going to do anything.” And then also became really bitter.

And I think the way that I addressed the situation was I spoke to that person once, I spoke to them twice, I spoke to them a third time. And I think the message is that people are not going to hear what you're trying to tell them that first time but you need to be able to go back a couple of times and be willing to go back a couple of times to have that conversation with them and again, meet them where they are. And ask them, again, what is it that you're looking for? I think that's another question, “What is the end goal for you?” Because my end goal could totally be far from what your end goal is. What's your end goal and let's get there.

Deb Zahn: And that's a mistake that so many consultants make, particularly when they first start off, is they think their job is to show up not just the answers, but the actual goal that will be imposed upon whoever it is that they're working with, whether it's a person or an organization. And so that discovery process of figuring out what's worth it to them is so powerful.

Kathy Alexis: Right. Yeah. And I think they'll take ownership of the process also, right? Like if I say that we're going to do what I say or what I'm offering you, or this is the goal that I think we should be, you're not going to take ownership of that process. It has to be something that means something to you. It has to be a goal that you really want to acquire in order for you to really do the work, to get there. So that's important, I think.

Deb Zahn: Yeah. Because otherwise you're either just going to play to the test or do the bare minimum to keep someone off your back.

Kathy Alexis: That's right.

Deb Zahn: And I've had that when I've worked with organizations before where they're like, "OK, so our boss told us we had to do this. And so we'll do what we're told, but that's it because your goal is not our goal, and nobody's asked us what we want." And that's where things often fumble.

Kathy Alexis: And that doesn't feel good to me. I don't know about you Deb, it...

Deb Zahn: I hate it.

Kathy Alexis: Yeah. I don't want to walk in and people are trying to avoid me and not answering my calls.

Deb Zahn: And avoiding contact, diving into a bathroom when they see you.

Kathy Alexis: I don't want to be that person. I remember when I first started in quality improvement, I have a relative of mine who's a doctor at a community center and she was like, "Oh, quality improvement, so you're that person that we don't want to see, right?"

Deb Zahn: Yeah.

Kathy Alexis: And I was like, what did I get myself into going into this field? I don't want to be that person that people don't want to see. I get it, but I want to always make sure that I am providing value. And the only way for me to provide value is to meet you where you are, and so that you can realize your own success.

Deb Zahn: That's right. So you're not, and the expression I heard someone use once at an organization is that the quality improvement or the people who are showing up to make the change happen are the should'ers. They're just going to should all over us, and then all we need to do is run down the clock until their contract is over. As opposed to, "Oh look, there's someone there that is actually going to help us achieve things that matter to us! Thank goodness because we needed help to be able to do it." Which is a whole different way of going at it.

Kathy Alexis: Exactly. I really look forward to that part of it.

Deb Zahn: That's worth getting out of bed for.

Kathy Alexis: Especially these days, it's really important to have something to get out of bed for.

Deb Zahn: That's totally true. So what do you see as your future in terms of, are you going to keep doing both, or you still trying to figure it out?

Kathy Alexis: Right now I'm pretty new to the consulting world so I think I will definitely still do both because I really do enjoy quality improvement, I enjoy working with the teams. I'm also thinking about going into strategic planning...

Deb Zahn: Nice.

Kathy Alexis: ...And really what I envision for that is working with startup companies to help them really plan what their strategy is for reaching out to their population, whatever the population is that they're looking to work with and really create that how and the why of how they're going to do things. And so I know you're one of the experts in our world so I need to get there one day and that's really what I want to work on.

Deb Zahn: But you know what? Here's what I'd say is you're starting in a better place than most strategic planners start because most strategic planners, sadly, only pay attention to the "what." And they don't know the "how" because they've never been in the mud trying to make the how happen like you have. And I certainly have, I mean, I had to implement other people's plans before and, "Grrrrr, why would you do it? That was ridiculous!" You know that whole grumpiness, but that helps you figure out that strategic plans are only as good as implemented strategic plans and knowing the how is a powerful thing. And it's sadly relatively rare.

Kathy Alexis: Yeah, it is. And being able to go back to it often. You don't just plan when you're first starting out the business, right? You have to be willing to go back if not annually, maybe every three years or whatever the case is, but making sure that you do go back to that initial blueprint and see how to revise it.

Deb Zahn: That's right. I think I told your former boss when I did a strategic plan, I said, "If I come back in a couple of months and there aren't coffee stains and probably some wine stains on the strategic plan, then I'm going to be disappointed." Because I know that means they're gathering dust on a shelf as opposed to, this is a living breathing thing that you work with and enables you to make decisions based on strategies that will get you to a place that you want to get to so that you're not just doing sort of random things all the time. And I did come back, and there were no coffee stains. There were some wine stays, maybe a few extra.

Kathy Alexis: Yeah. Well, it gets you through the days and night.

Deb Zahn: That's right. She was definitely working it.

Kathy Alexis: Absolutely.

Deb Zahn: So let me ask you this last question because again, you're working in two areas, you're going to go into a third, all of which makes complete sense to me because the transfer of skills across those different areas is in my mind, perfectly logical. But I know you have a full life in addition to the things you do for work. So how do you bring as much balance as you can get out of that in the way that you want it to look?

Kathy Alexis: Yeah. I have great family members, and I really love spending time with my cousins, with my friends that I consider my family. COVID makes it a bit difficult because you don't really get to see people, but a lot of Zooming...

Deb Zahn: Center of our lives.

Kathy Alexis: That's right. A lot of wine, as we mentioned earlier.

Deb Zahn: There you go.

Kathy Alexis: But honestly, there's like mindless TV that helps also. My spare time is really just being home and just coming into myself, whether that's doing a little bit of yoga, working out, talking on the phone, the mindless TV as I mentioned, and just kind of plan on where I want to be or what I want to do. I wish there was a lot more that we can do these days, but right now-

Deb Zahn: That's a lot, what you just said.

Kathy Alexis: I want some more.

Deb Zahn: No, I thought that was a great list. I'm like, wait, what am I doing with my free time? My goodness. I thought that was great.

Well, so Kathy, any last words of wisdom for people who are looking to be consultants in whatever it is the type of work that they do? Any last words of wisdom you would share with them as they embark on that?

Kathy Alexis: Sure. I would say, don't be afraid to ask for help. Don't be afraid to find that person who's been there, who's done that to be your mentor. To really guide you through. It doesn't help you to try and do it by yourself. So if you can find someone to get on that road with you it makes it a bit easier, at least you're not feeling so lonely. So I would say that's really one of the major lessons that I learned in this process, that it's OK to ask people for help.

Deb Zahn: I love that. That is a beautiful way to end this, Kathy. Thank you so much for joining me on this.

Kathy Alexis: Thank you so much, Deb. This was a pleasure.

Deb Zahn: Thank you.

Thanks so much for listening to this episode of the Craft of Consulting Podcast. I want to ask you to do actually three things. If you enjoyed this episode or if you've enjoyed any of my other ones, hit subscribe. I got a lot of other great guests that are coming up and a lot of other great content and I don't want you to miss anything. But the other two things that I'm going to ask you to do is, one is, if you have any comments, so if you have any suggestions or any kind of feedback that will help make this podcast more helpful to more listeners, please include those.

And then the last thing is, again, if you've gotten something out of this, share it, share it with somebody you know who's a consultant or thinking about being a consultant, and make sure that they also have access to all this great content and all the other great content that's going to be coming up.

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