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Musings

#269: Musing November 27, 2025

Happy Thanksgiving! Thought I might provide some potential dining room table topics for you.

Most of us will enjoy a sumptuous meal today. The secret new source of decent food is your local gas station. Our girls make fun of me for the percentage of my meals that come from gas stations. Brats from Kwik Trip, brisket sandwich from Buc-ees, tuna from the Shell at York/Ogden and key lime cheesecake from Super Day's Express (thanks Z) all are awesome. Diners, Drive-Ins and Dives needs to expand.

I have previously written about having a culture of innovation. Think how badly Kentucky Fried Chicken missed the ball. They literally had thousands of restaurants selling only chicken yet didn't have a good boneless Chicken sandwich and now are an afterthought in the Chicken war. They missed how consumption was moving from "take it home" to "In the car."

Hims & Hers Health is innovating in the boring blood testing space dominated by Labcorp and Quest. In this day and age where individuals serve as their own primary care provider, testing sites need to be run more like a Starbuck's offering good setting and customer service straight to the consumer.

Hope you survived Green Wednesday. I guess the young crowd decided the Wednesday before thanksgiving was a great day to get high. Cannabis industry reports that yesterday is the highest sales day after April 20th. This is probably easier on parents than Blackout Wednesday.

Work on your kids handshakes over Thanksgiving. Firm. Direct eye contact. I can't stand the wet noodle nor the princess fingers only.

Don't mind the cranky older relative today. The filter is gone and you have authenticity. As you grow older, you appreciate that time is your most precious asset and how you allocate it is one of the greatest decisions you make. "I have a lot of time for him/her" is quite the compliment.

Speaking of authenticity, how about Zoom background or not? I am a fan of showing your real settings in the background as a part of communicating authenticity.

A southerner saying "bless his/her heart" is not a compliment. Just a southern version of Minnesota nice. Conflict averse and not authentic.

Here is a test of your natural anxiety level. When do you fill your gas tank? I personally never get below ¼ full where many go down to the 5 miles left warning. Same for cell phone. I never go down below 25% before recharging. No right or wrong but interesting window on core personality.

Amazing the impact a liberal arts education can have as Steve Jobs attended Reed College in Portland, Oregon (he actually dropped out) and took a calligraphy class which later influenced Apple's typography. Now we talk about Calibri vs Aptos.

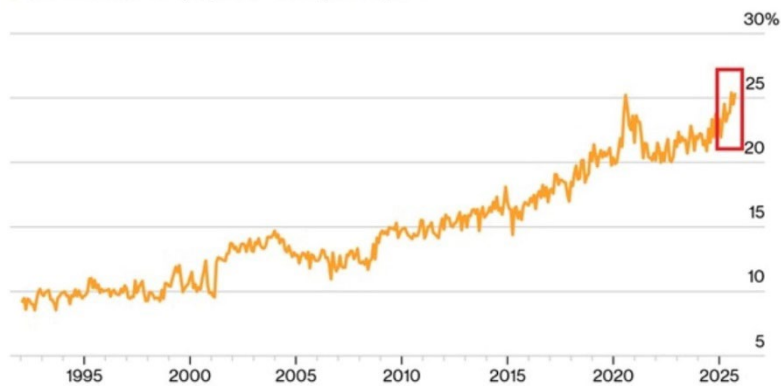
Remember your audience. I am reasonably well educated person and not sure I could define what an oligarchy is nor a sentient model. This is part of Mamdani's effectiveness — everyone understands affordability.

Fascinating stat. Sure you want to be paying for that kid to go to college? Maybe Jobs and Gates were right to drop out.

College-Educated Job Loss Rises

White-collar slowdown hits four-year degrees

Share of US unemployed with four-year degrees



Sources: Department of Labor, Bloomberg

The "AI trade" is implying becoming too dominant. Goldman estimates that business investment in AI might have accounted for as much as half of the growth in GDP in the first six months of the year.

Avoid the vacuous "That's a good question." I literally heard a news reporter use that line when the anchor asked "how is it out there?" Seriously, quite the penetrating question.

As we all lament the influence of smartphones and social media, blame Aza Raskin. He invented the "infinite scroll" concept (pretty brilliant actually) so you can waste hours simply looking at a bunch of crap online like Sydney Sweeney's (who isn't even that attractive) latest outfit. Raskin eventually "turned" against big tech. He has said "one of the most pernicious aspects of social media is that you are getting constant and infinite validation that people like you more when you look a little different than you actually do.

Is it a good or bad thing that smartphones can be used to track kids? Personally, I am more of a free range parent and believe tracking reduces their autonomy and development of judgment. It can also create much unneeded anxiety as parents look and think their kid is somewhere when the phone might have gone dead or location services not working.

Doo.doo..doo..doo....Baby shark is the most watched video ever on YouTube.

K-Pop Demon Hunters has now hit the cultural status that we all most watch it.

Can J-Lo please put some clothes on? She is in great shape for 56 but c'mon.

Despite what you saw on WKRP, turkeys can fly.

Bring back some chivalry. Let the women sit first and help with their chair.

No negativity allowed today. Give out compliments and thanks. Volunteer for dishwashing duty (those are the people you should hire).

Great essay by Rishad Tobaccowala on how to embrace change after my initials below.

Happy Thanksgiving! Put down the phone after you read this and ask some questions:)

Jml

Rishad Tobaccowala reprinted here in its entirety:

Organizations everywhere are struggling with change and seeking new ways to grow especially in these [Tectonic Times](#).

Many specialists help them find a way forward. *A cavalcade of consultants, convey and communicate with countless charts, a curated combination of choices to the C-Suite. A flurry of futurists frame, focus, and filter the way forward with the finesse of fortune tellers. Masters of the Universe market M&A moves that might make multiples move upwards and manufacture many millions in market-cap. PR professionals produce and promote points of view that position and polish to provoke the press to perceive with pristine perspectives.* While all of this may be important ***none of these will work without growing and changing the people in the organization.***

While firms are a collection of ideas, technologies, patents, brands, ecosystems and people, it is people who are the the key. Because it is the people who create the ideas, technologies, patents, brands and eco-systems!

And in today's AI age the technology itself is not a differentiator since everyone builds on the same half a dozen foundational models. It is the Humans who combines with the Alien Intelligence (a better description of AI) that produce the distinctiveness and differentiation which drives value creation.

People and Organization the real challenge.

Michael Tyson said, "*Everyone has a plan till they get punched in the face*".

Boards and leadership of firms come quickly to the realization that ***everything is easy until people get in the way.***

Today, all over the world is there is deep concern among people in many organizations that AI is a threat to their livelihoods. Richard Edelman earlier this week at a dinner that Terence Kawaja invited us to after the announcement of the [AI Lumascape](#) (take a look it has created quite a stir) handed me the latest [Edelman's Trust Barometer flash poll](#) which is worth reading. Here is the [link](#) to the report and one

of the slides is reprinted above.

Whether it is Accenture, Bain, BCG, Deloitte or McKinsey, they all appear to be aligned that AI transformation will **primarily** be about people and organizations and not technology. Here [is a great piece](#) on Julie Sweet the CEO of Accenture on the need for reinvented leadership.

Telling people that change is good, threatening them with job loss if they do not change or creating communication materials and slogans to goad them into a cult like devotion to the new dear leader or the way forward rarely works in the short run and will likely fail after the threat of flagellation fades.

Too many companies are focusing on efficiency, effectiveness and enterprise technology versus talent.

Because, if there is nothing in it for them, people will **out-wit, out-wait, out-pretend, and out-maneuver** “management”. Until then they will fill the time genuflecting and bowing and going through the monitored motions of attending the right meetings, muttering the motivational mantras and stating the slogans required.

Today 67 percent of GenZ employees have a side gig with which they generate income, using the salary from their “main job” to create new options for themselves. After all , for 60 dollars a month anybody at any level, can have the latest Google, Open AI and Anthropic tools that run circles around what they are allowed to use at work. These tools provide all of us with cost effective and fast ways to launch AI first businesses with talent of any type (Agentic employees galore) and humans distributed anywhere in the world.

If we want our organization or our teams to grow and change we will need to deliver answers to four questions to our teams:

Why are the recommended changes good for them?

How can it help them grow ?

What are the monetary or other incentives to change?

When and where will training be provided to help them learn the new skills needed?

Change does not happen because of M&A, press Releases, re-organizations, or announcing an Open AI or some other AI partnership.

An organization changes and grows when the people in the organization change and grow.

2. There are two ways to change an organization: Get people to change or change the people.

What are the key ingredients that helped drive the successful transformation of companies including very large ones like Walmart and Microsoft?

Both firms had “lifers” take over as the CEO after years of each company roaming in the wilderness. They both succeeded in rejuvenating their firms by combining two different approaches:

A) Upgrading the mindset of a majority of the people at the firm.

This is best seen by the changes Satya Nadella has made at Microsoft which including moving from a “know it all mindset” to a “growth mindset”, a focus on enterprise and business professionals, a shift to

openness and cloud and the elimination of the Windows Operating division. He also engineered a move away from a prickly approach of a “We vs the World” mindset to the embrace of the everything in the world including Linux with the purchase of GitHub to the Open AI investment and the hiring of Mustafa Suleyman from Google.

Through it all the focus has been on new behaviors and mindsets of people including top level and key talent.

B) A recruitment of key outsiders and high-level leaders and an investment in new people and skills.

This can be seen at Walmart. Doug McMillon who just announced his retirement, completely re-imagined the company through a combination of bringing in outsiders with acquisitions such as Jet, Flipkart, Vizio and most recently Dan Danker from Instacart to lead AI initiatives and launching highly profitable new lines of business such as Walmart Connect. But a major emphasis was also made in investing in current employees with better pay and job flexibility combined with a significant number of initiatives to up-skill employees including a [one billion dollar investment](#) in Walmart Academy.

Central to changes at both these companies (whose market value have increased four fold (Walmart) and ten fold (Microsoft) in a decade under these leaders) are that they combine revitalized/new leadership, a re-defined strategy and or organization with an emphasis on investing in growing and helping as many employees as possible transform themselves.

A new strategy, a new leader and a new organization are often necessary, but they are never sufficient to regain growth and manage change. To achieve this aim it is critical that the rank and file needs to be communicated with, incentivized and trained to change and grow.

3. The Six C's Required of Modern Talent.

Today like never before we are living in a world of rapid transformation and change. New industries rise and fall and the inter-connected unstoppable forces of globalization, demographic change and technology twist and toss all of us.

In this landscape how do we train talent or hone our own skills?

What will remain relevant and in demand in an age of shorter and shorter half-lives of firms and business models?

Six key skills will be essential in the future. Three of these have to do with the individual (**Cognition, Creativity, Curiosity**) and three on how we connect with each other and the world outside our minds including working with Agentic employees and AI Tools (**Collaborate, Communicate, Convince**).

Cognition is simply learning to think and keeping our mental operating system constantly upgraded. This requires deliberate practice and sustained work. Improved cognition is achievable.

Creativity is connecting dots in new ways, looking beyond the obvious and this skill will be key as AI powered computers, data crunch and co-relate faster than we ever will. To be human is to be creative. Creativity as vividly described by Sir John Hegarty is [“an expression of oneself”](#).

Curiosity is simply being alive to possibilities, questioning the status quo and asking two questions. What If ? And Why Not ? Today the key competitor or opportunity in any category comes from outside it. Curiosity may have killed the cat, but the lack of curiosity may kill the the careers of many people.

Being cognitively gifted, creative and curious will not be enough since we are living in a connected world where eco-systems, teams and linkages are how ideas are born, value created, and long-term careers forged. It is a world where we will need to combine with five types of employees in a firm (**Full-time, Free-lance, Contract, Fractionalized** and **Agentic**). To do so we will need to hone, build and train for three other skills:

Collaborate: Collaboration is key to work in a world where API's (Application Protocol Interfaces) and MCP's (Machine Context Protocols) are not just about handshakes or conversations between technology but also between individuals with different skills, teams in different countries, partners, suppliers and much more.

Communicate: Learn to write. Learn to speak. Learn to present. It may be so old school but watch the people who succeed, and they are good at communication. And all of these can be taught and learned.

Convince: Every one of us is a salesperson regardless of what we believe our title is. This is true even if we do not sell anything at work. We have to convince colleagues of our points of view. We have to convince our partners to join us on our life journey. Learn to convince and learn to sell. Story telling is a key.

It is rare that a company can avoid hiring significant talent from outside if it is serious about transforming itself to change and grow. New skills, new mindsets and new blood enhances the corporate genetic pool.

But these hires are particularly fraught, and experience indicates that focusing on four key criteria can minimize the risk.

These are a) Mental Agility, b) Integrity, c) Impact and d) Fit/Chemistry.

Two of these filters **Mental Agility** and **Fit/Chemistry** require multiple interviews and two of them — **Impact** and **Integrity** —require deep investigation (background checks, references).

Mental agility is key to lead a team or a company in a world of change and only in an interview can one test for this. Similarly, chemistry matters. Too many companies bring in a wunderkind who either fails to adapt or is chewed up and spit out by the organization. ***While "Culture" may eat strategy for breakfast it hones its chewing skills by gnawing on the bones of outside talent.***

Integrity and Impact needs to be evaluated over time and requires in depth research. Integrity has never been more important and in today's world trust is increasingly key. Impact on Business can be measured through financial results but as important is how the individual has built teams, grown people and dealt with long term periods of stress or setback.

Ex-bosses and ex-direct reports are usually the ideal people to interrogate since they can provide perspective, put things into context and provide a multi-faceted picture of the person and are far less constrained than current colleagues or suppliers.