

The ZEN Approach™ to Project Management

*Working from your Center to
Balance Expectations and Performance*

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May all beings be happy and find the root of happiness.

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Chapter 1

Managing Your Projects Wisely

Are you awake?

“What a question.” You might be thinking, “Of course I’m awake. I’m reading and thinking, am I not?” But what does it mean to be awake in the way that a Buddha is awake?

“Buddha” literally means awakened one, and this book is about what it means to be awake in the way that a Buddha is awake. Of course, it is also about project management and how to do it as well as it can be done. But from the point of view of Zen, managing projects is both a quest in and of itself and a vehicle for awakening. Essentially, we are going to reveal how project management can be used as a Zen art. In Zen there is a tradition of taking apparently mundane daily activities and elevating them into art forms that create paths to spiritual awakening. What makes an activity like project management an art or “Way” is to practice it both for the immediate result and with a view to purifying, calming, and focusing the psycho-physical apparatus—the body-mind complex. The Zen approach will not only benefit your project work tremendously, but it will allow you to extract more personal value from it.

The Zen activity becomes a focal point for concentration as well as a vehicle for addressing all the personal and relationship issues that arise when we are actively trying to accomplish something with a high

degree of excellence under challenging circumstances. While perfecting the outer work, important inner work is done, and awakening takes place. This is a book, then, written for people interested in both managing projects and finding a way to reach their highest potential.

Have you ever acted out reactively in response to a wave of emotional feelings? Have you done complex things like driving a car, riding a bike, running on the treadmill or managing a project while *spaced out* to the extent that you have no recollection of how you got to where you are? What did it feel like to wake up and find that you have run a mile on auto-pilot? On the other hand, how does it feel to be completely engaged in an activity while being completely relaxed and aware of everything that is going on in and around you?

Zen is an expression of perennial wisdom. It is a life strategy for managing in an unbounded, unstructured, and groundless field of experience. Are you confused yet?

“What is the Way?”

“The Way does not belong to knowing or not knowing. Knowing is illusion. Not knowing is lack of discrimination. When you get to this unperplexed Way, it is like the vastness of space, an unfathomable void, so how can it be this or that, yes or no?”¹

Going Beyond the Intellect

Zen is about “blowing the mind” out of its normal view. It uses techniques like koans, Zen arts, dialectical argument, self inquiry, and meditation to help the practitioner go beyond his intellect to experience things in an unfiltered way.

All of the methods of Zen attempt to tease you past the confines of the rational, logical mind, past the level of thought, to a much more direct experience of reality. Thus, to understand Zen, it is necessary to abandon all ideology, all presuppositions as to what reality is. In other words, we cannot understand these nonverbal levels by thinking about

them; we must simply experience them. As Wendell Johnson points out: “When we have said all we can in describing something, ... if asked to go further, we can only point to, or demonstrate, or act out, or somehow exhibit tangibly what we ‘mean.’”²

“What is the sound of one hand clapping?” is a well known koan. Like all koans there is no intellectual answer. The method is to concentrate on the koan and let go of every attempt at contriving the answer. The answer comes experientially. The process helps to unveil experience from behind the words we use to explain it.

Here is a Zen of project management koan: “When is a project that has no set requirements and no resources complete?”

Another interesting method for going beyond the intellect used in some spiritual traditions is the repetition of the question “Who am I?” Each time you arrive at an answer (“I am Joe, I am Sue’s father, I am a manager, I am an American,” you ask the question again, and each time an answer is reached, the answerer is confronted with the question: “Who am I?”, “Who’s asking?” Don’t look for the answer intellectually. Just ask, and observe your experience as it goes to deeper levels (“I am a human being,” “I am an organism composed of molecules and atoms,” “I am Consciousness....”)

Of course the power of the intellect as a tool for skillfully living in the world has to be acknowledged. Going beyond the intellect isn’t about becoming irrational; it’s about getting out of the limited view caused by relying *solely* on our intellect. It is only when we recognize the limitations of the intellect that the intellect can be used most effectively. This is a particularly difficult area for people with strong intellects!

No Ground

Some decades ago it became clear to me that something had removed the ground I was used to standing on from under my feet, and that the structures that I once relied on to guide my life through a neat progression of stages were no longer operating.

How often do you feel, in the midst of your projects, that you are in free fall? The ground is gone. There are no rules. Change is coming so fast that it seems almost impossible to handle it.

Some people just freak out. Others construct elaborate belief systems and structures to create the illusion of stability and protect themselves from the chaos. Others get good at operating joyfully in free fall. We are in a time in which our beliefs and the structures we have built to protect us from the chaos seem to be breaking down under an onslaught of changing values, conditions, and rational thinking. It seems that the most effective strategy is to get good at feeling comfortable in the free fall state. After all, since there is no ground, we can't really get hurt, so why not enjoy the trip?

Over the centuries, perhaps since the beginning of human consciousness, the greatest, wisest beings have sought to operate effectively and joyously, day to day, in a chaotic world while exploring the underlying reason for being and the essential nature of our existence. Wisdom traditions are found in all cultures and are compatible with any religion. Many believe that these wisdom teachings are really the foundation and source of the world's religions and philosophies.

Seeing Things as They Are

“Dispassionate objectivity is itself a passion, for the real and for the truth.”

Abraham Maslow³

The Zen approach is founded on the ability to see things as they are. Moment to moment mindfulness, coupled with an inquiry into the nature of how and why things work, are the principle tools. A Zen approach blends a systems-oriented view with the need for dynamic balance and complete accountability and responsibility for one's actions. Zen works to overcome static *either-or* thinking.

The approach uses the right degrees of analysis and intuition; hard

and soft skills. It insists that the individual be “centered,” skillful, realistic, and sensitive to the needs and behaviors of self and others. It addresses the experiential and behavioral aspects of performing. And it is founded on the understanding that all effective action stems from compassion and lovingkindness based on the realization that everyone is in the same boat.

In this book, the term *Zen* is used to roll together all of these concepts. This is not an orthodox treatment of Zen. The book could have been called the Yoga, Tao, or Way of Managing Projects. In the end all of these terms are pointing to the same basic strategy—regard everything as a part of a holistic, integrated system, set your intention to include all of your personal and nonpersonal goals, apply objectivity and subjectivity in dynamic balance, seek to perfect yourself and your performance while not being hung up about your imperfections, and recognize that a balance between doing and not doing is essential for healthy living in the world.

The message is: Be mindful, consciously aware, critically analytical, kind and compassionate, focused like a laser, open like the sky, fearless in the face of reality, self-confident, and humble.

Paradox and Balance

Paradox is the norm when it comes to working with complex concepts and relationships. There are *no* absolutely right answers. We seek the answers that are right for the situation.

Many people want certainty. Clients, project sponsors, project managers, and others all want to know when what they want will be done, how much it will cost, exactly what they have to do, and how to do it. But life is filled with paradox and uncertainty. For those who desire consistent repetition of a well-articulated script, this is disconcerting. For them, deviation from the plan creates discomfort.

Others want no structure. They like to let the future unfold as it will and to creatively adapt to its conditions. They feel that structure gets in the way of creativity and it is unrealistic to tie themselves down.

This division between the structured and unstructured schools of thought is one of many such dichotomies. The knee-jerk reaction to dichotomy is conflict; however, in the wisdom way, we apply the principle of balance, that dynamic state of ease that occurs when all opposing forces are present to the right degree. There is nothing in excess and no insufficiency. As conditions change, the balance is maintained by adjusting the forces—just like balancing on a tight rope. Too rigid or too loose, you fall. Too far to the right or left, you fall. Think too much about it and you fall.

Paradox and dichotomy are words that imply two. In the Zen way there is one; within the one there are many. Balance is among many interacting forces and many possible ideas within that singular whole. The wise think in continuums, not polarities. What is the right point to be at in the continuum at this moment? That is the question we subtly ask to help maintain balance and avoid unnecessary conflict.

Letting Go

The wisdom approach goes beyond thinking. It is about experiencing. It is about simply “letting things happen.” Letting things happen is pretty unconventional in the context of project management. After all, projects are about *making* things happen, not *letting* them happen.

How do we let making things happen, happen?

How can we initiate plan, execute, control, and close projects with the highest degree of excellence while *letting go* into the flow that occurs when intention, effort, concentration, mindfulness, and skill are all in proper balance? How can we be dispassionately objective and still address our goals and objectives with the passion required for excellence?

These are the questions to be answered in this exploration of project management from the Zen perspective.

Zen elicits an image of clear, quiet peacefulness, like a beautiful rock garden or a still pond set among pines with a full moon reflected in it. Projects and project management often elicit a very different image—drive, controlled chaos, tight schedules, restrictive budgets, anxiety, conflict, disappointment, accomplishment, value.

Inner and Outer Work

Can these two images be reconciled? How to do we blend Zen and the underlying wisdom it represents with project management and its quest for satisfying people and organizations with valuable outcomes within time and cost constraints?

Blending Zen and project management enables us to more effectively manage projects to get the results we want, when we want them, for the price we expect to pay. This is the outer work—perfecting the form and perfecting its results.

Blending Zen and project management enables us to consciously perfect the form while using whatever we do, in this case managing and working on projects, as a vehicle for overcoming the obstacles that keep us from achieving self-actualization. Self-actualization, in Abraham Maslow's terms, is the *"intrinsic growth of what is already in the organism, or more accurately, of what the organism is."* Reaching full potential, then, comes when an individual eliminates the self-imposed barriers that are blocking it. This quest for self-actualization is the inner work—perfecting the self.

Who This Book Is For

Everyone does projects. They range from the small and simple to the large and complex. Projects are the means for making all improvements, developing new products, putting on events, and anything else that requires work to be done to achieve results within a finite time and cost.

Projects are often more complex and stressful than they need to be. Far too many of them fail to meet expectations. There are far too many conflicts. There are too few moments of joy and too much anxiety. But there is hope. It is possible to remove the unnecessary stress and complexity. This book is about how to do just that. It links the essential principles and techniques of managing projects to a “wisdom” approach for working with complex, people-based activities.

This book is for anyone who manages, works on, or is interested in projects, whether they are certified project management professionals (PMPs) or not. Most people who manage projects in the world are *not* professional project managers. Many are untrained and have little or no professional support. Some do not even know they manage projects; they just get things done. There are professionals who manage large complex projects in global settings and incidental project managers who manage or take part in projects that are part of their normal jobs in just about any field. There are others who manage projects like moving, renovating a kitchen, or putting on a wedding. But everyone can gain value from stepping back to see the big picture objectively, while at the same time retaining that personal perspective that represents one’s experience, knowledge, and intuition.

Wisdom

Wisdom is applied experiential knowledge—knowledge beyond intellect—based on an unobstructed, unfiltered view of how things are. It is founded on the ability to accept things as they are as a starting point for meaningful, useful action. This ability to accept things as they are is enabled by working from one’s “center”—that calm, objective place from which action flows in a way that is perfectly appropriate to the situation at hand.

Everyone can experience a sense of inner peace. Everyone has the ability to *take a step back* to see things objectively. Doing so makes project success more likely. In fact, that is what managing projects is all about—objectively looking at performance by initiating and plan-

ning, by coordinating and controlling, and by closing the project in a way that sets a solid foundation for the future. This same quality of seeing things objectively can be applied to everything we do. Project management becomes a metaphor for how we can live our lives and, if we follow the wisdom traditions, the way we live our lives becomes a metaphor for how to manage projects.

That is not to say that we have to formally plan everything, and keep track of everything we do, and be emotionally shut down. It means that when we are doing whatever we do, we can be aware of our intention and our objectives. We can be aware of why we have our intentions and objectives, of the beliefs that lie behind them. We can be aware of the impact of our actions on achieving what we want to achieve and on the people and things around us. We can be aware of the limited degree to which we actually have control of ourselves, others, and our environment, and the inevitable reality of impermanence, uncertainty, and risk. By being aware of these things, we question everything we do and the beliefs that lead us to do them. This gives us the ability to apply the most skillful means possible to accomplish the most effectively selected ends.

Improve Performance

Stepping back provides the *edge* needed to excel. The Zen approach is about being able to step back without disengaging from the current situation—being simultaneously dispassionately objective *and* passionate. It is about doing the dishes, chopping wood, and carrying water, or writing a weekly status report in a way that makes these mundane activities parts of a fully integrated, joyful, and perfect whole.

This book is about how to improve intrapersonal and interpersonal performance. It is about getting the right projects done right. It explores how to integrate and apply a highly effective personal and project management approach to minimize unnecessary conflict, stress, and disappointment, and to achieve results that meet or exceed expectations.

The book guides readers in exploring how to:

- maintain moment to moment mindfulness to maximize effectiveness;
- use planning and communication techniques to establish and manage realistic expectations, the roots of project success;
- remain calm and energetic while being active and effective in the face of chaos, fear, resistance to change, unrealistic demands, conflict, and the other aspects of project life that cause stress;
- take a systems or holistic perspective to see where projects and the people who perform them fit in their environment, affect it, and are affected by it;
- break free of self-imposed barriers to creative thinking, conflict resolution, and problem solving;
- use day-to-day experiences as opportunities for continuous personal and group improvement.

To be more effective, you have to weave together practical techniques, core “wisdom” concepts, and basic principles of project management; integrate the “scientific,” technical side of project management with the interpersonal and intrapersonal behavioral skills that are the real keys to effective performance; and balance the right and left brain to become more effective.

What does it mean to be more effective? It means accomplishing the things you want to get done without excess effort, while making sure they will be useful to the people, including yourself, who are the beneficiaries of your work. Being effective also means integrating your personal life and work life into a whole that includes a quest for self-actualization along with fulfillment of your social, security, recognition, and physiological needs. Being effective is making good use of your time and effort, rather than wasting it on unnecessary and unpleasant pursuits that have no positive payback.

Analysis and Systems View

We will explore Zen and the individual project management elements such as risk, communications, people management, and estimating. These, however, are never found independently in real world projects. Risk is an integral part of estimating and scheduling. Cost and time have a complex relationship with each other and with the quality of results and resources. Communication is a critical enabler for everything we do. Process management and performance improvement are fully integrated with performance itself. What we do today influences what we do tomorrow and how we do it. Zen is integrated into the relative world of people and things.

Subjects may be looked at separately to obtain analytical clarity, but in the end they are all unified in a single system. It is all one. Everything is part of a web of interacting people, places, things, events, thoughts, feelings, and sensations. Everything exists in a complex system in which any action anywhere (note that speech and the decision *not* to act are also actions) has an effect elsewhere, and perhaps everywhere. Therefore, be mindful of what you do and why you do it. Be mindful of the fact that while you can predict the impact of your actions sometimes, you can't predict their impacts all the time. Even when you think you are in control, you aren't.

In addition, complex systems are nonlinear. They do not simply consist of a set of sequential steps. Time and the interplay among the objects and actions in the system create a dynamic, cyclical process. To manage well, therefore, requires *a nonlinear* approach, one that intertwines the various parts into a cohesive whole, like the various strands that make up a strong rope. While the strands may be individually interesting, it is the rope that is of real use. In the same way, projects, like the rest of life, do not unfold neatly in a simple linear progression. Things happen based on causes and conditions. Everything that happens becomes the causes and conditions going forward.

There are complex cycles over time. For example, when we define requirements for a project and base an estimate on them, we invariably

find that defining the requirements and delivering an outcome based on what has been defined elicits changes. The client, seeing what he asked for, realizes that it is not really what he wants. The reality of the concrete, delivered outcome is different from the idea he had in mind, and the idea is different from the statement of requirements.

The wise project manager accepts this reality and follows a process that allows for the progressive elaboration of requirements in a way that enables the client to see as concretely as possible the implications of his requirements. As the requirements come closer to being a true reflection of the desired outcome, estimates are modified.

Because projects are human systems and human systems are the most complex, there is no cookbook of ordered steps. There is a useful set of ingredients that are combined to suit the needs of a situation at hand. At the same time there is a comprehensive model that if adapted to the needs of a situation will significantly improve the probability of success. It is possible to learn from experience and it is quite skillful to apply that learning in future efforts, but don't think that anything involving people working across time will consistently repeat itself exactly as it has occurred in the past.

While there is no cookbook approach to project management that works, there is great power in having a repeatable process that is adaptable to current conditions. This is just one of the many paradoxes found in our world of projects and Zen wisdom. We need processes, standards and procedures defined. We need rules. Yet none of them are ever able to truly define the real world.

Paradox is a fact of life in complex systems. Not this, not that, but some combination of the two.

Awareness, Concentration, and Mindful Presence

A Tibetan teacher of mine, Namkhai Norbu Rinpoche⁴, considers awareness, concentration, and mindfulness to be foundation elements in the wisdom approach. He gives an example of a normal adult who has a cup of poison in front of him and is aware of it. He knows the

danger of poison and can help others be aware of the poison by telling them not to drink from the cup. But some of these others, even though they know of the danger, don't consider it important or have doubts about it. Some may not be aware. For these it is necessary to create a law against drinking from the cup or taking the cup out of their reach, as one would do with a child. These actions can save the lives of irresponsible people, people who lack awareness.

Namkhai Norbu extends the example to include the idea of mindfulness and the concentration needed to remain *present*. Assume that the adult, fully aware of the danger of the poison, forgets. He becomes distracted and loses presence. He is no longer mindful of what is in the cup. Thirsty and without thinking, he may take a sip and die.

With less fatal consequences, we see this operating all the time in projects. Even when we are aware of the danger of making promises without writing them down, or the consequences of changing requirements without documenting, evaluating, and approving them, we are not mindful and do what will cause us grief later. Awareness is knowing or being cognizant of something. Mindfulness is remembering that you know. Mindfulness can be cultivated.

Here is an exercise for cultivating mindfulness and concentration. Right now, you can take a moment to bring yourself to the present moment. Become aware of your body and breath. See how your breath is. Is it calm and long; short; choppy, so subtle you barely feel as if you are breathing? Feel your body against your chair; your feet on the ground. Exhale. Take a second or two to relax, mindful of your body and breath. Then go back to the reading.

If you become aware that you have lost your concentrated mindfulness on your reading (like for example, when you have read a paragraph or, maybe, several pages, but have no idea that you've read it or what was in it) just bring your awareness to your body and breath and begin again.

This is a taste of a core exercise for improving mindfulness and concentration. Doing this over and over again, consciously, trains the

mind to be more present. Being more present enables you to be more effective. Try it. It takes less than a minute. In this case you are practicing mindful reading, but you can do it wherever you are; whatever you are doing; whenever you remember. The more you do it the more natural it becomes. The more natural it becomes the more you remember to be present. The more present you are, the more likely you will do the right thing to get your project done well and the more you will be using your work to perfect yourself.

Throughout the book I will remind the reader. I will repeat the question “Are you awake?” and briefly restate this core exercise. The last chapter contains a more formal version of mindfulness practice and an explanation of how it works and how to use it in your life.

Influences and Intention

This book is influenced by my experience in blending business, family, social life and the search for self-actualization. As a business person and householder I have a very realistic sense of what goes on in companies, families, and communities. As a longtime practitioner of Yoga and the nondual teachings of Advaita, and a student, practitioner, and teacher of Buddhist meditation and wisdom, I have had a taste of what seems like “reality.”

Early in my experience, it seemed as if the material realms—work, family, organizations, schedules, and the like—were real and the spiritual, ethereal, realms imagined. Then, for a while I thought the reverse was true, that the so called real world was illusion and that the only thing that was real was emptiness and clarity. I have come to learn that

*“to deny the reality of things is to miss their reality;
to assert the emptiness of things is to miss their reality.
The more you talk and think about it, the further astray you wander
from the truth.”*

Stop talking and thinking and there is nothing you will not be able to know. ...

*Do not search for the truth: only cease to cherish opinions.*²⁵

We live in the relative world of subjects and objects, yet this world exists in the ground of unbounded absolute emptiness and clarity. While we skillfully can and should use our intellect to operate in the relative world, to achieve self-perfection we must transcend the intellect and simply experience things as they are. To get to the truth, it is necessary to see our opinions for what they are, opinions, and to question them objectively.

We collaborate with one another to create an illusion that keeps us stuck in a never-ending cycle of seeking pleasure and avoiding pain. That cycle is fueled by wanting things to be different from the way they are. This book is about how to break free of this cycle to reach self-actualization using the concrete daily work we are immersed in. In the Zen context this means reaching a point at which one awakens to his or her intrinsic nature – wisdom and compassion without boundary. While we are breaking free, we cultivate the qualities of skillful and ethical behavior that help us excel in what we do and make sure that what we do is of real benefit, not only to ourselves but to all beings everywhere.

As we approach this realization, we become experts at moving through life and playing in the illusion. The cycle no longer controls us. We are above it and in it simultaneously. What was once the hardship of living and working becomes a joyous dance. We do what we do expertly.

My wish is that this book be of benefit to anyone who wishes to awaken.