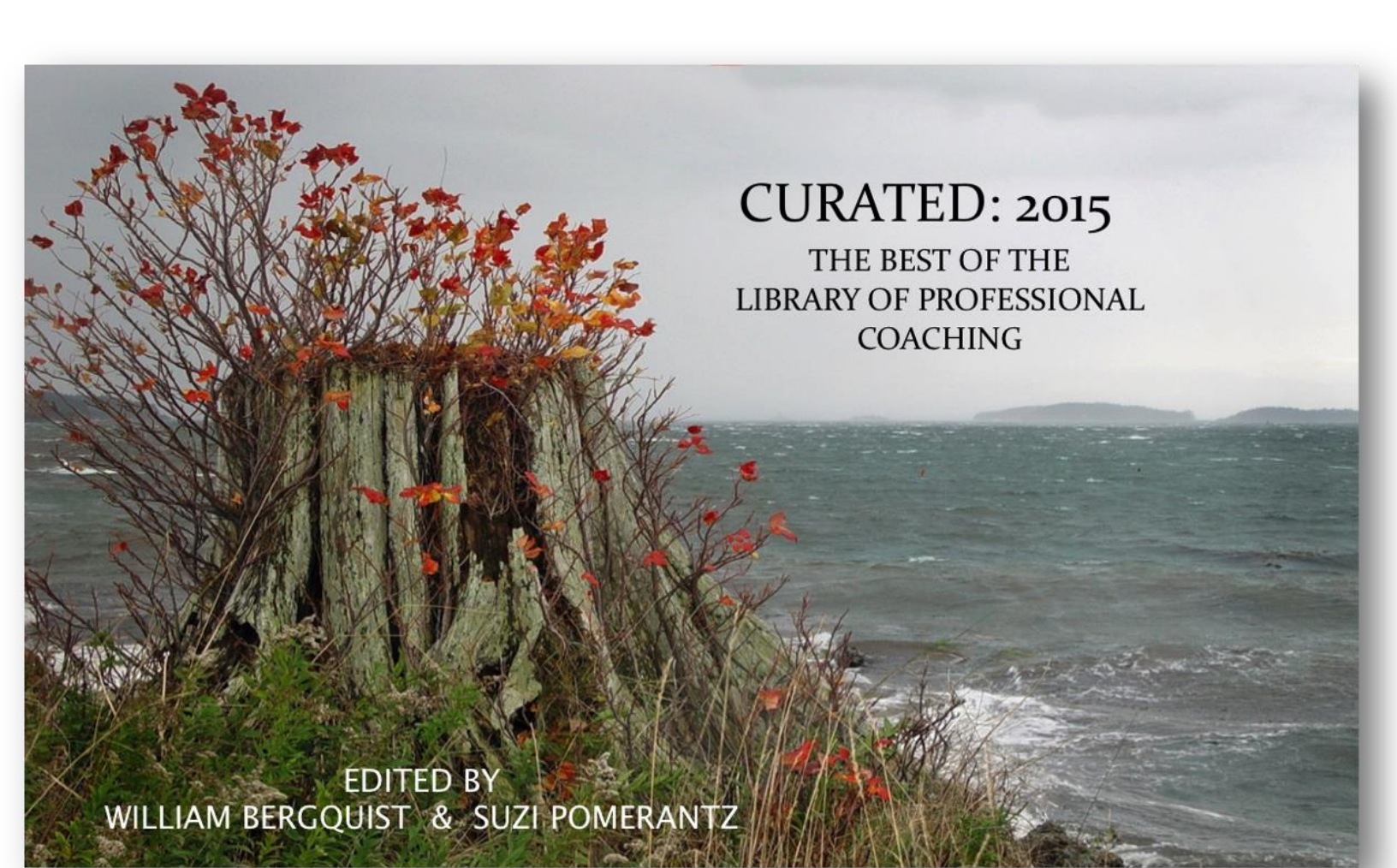# Curated: 2015

The Best of the Library of Professional Coaching

Edited by
William Bergquist and Suzi Pomerantz

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EDITED BY
WILLIAM BERGQUIST & SUZI POMERANTZ

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Dedication

We dedicate this edited volume to the 184 men and women who have contributed more than 500 documents to The Library of Professional Coaching as of the beginning of 2015. We also dedicate this book to those who have been indispensible supporters of this library—our sponsors, patrons and benefactors. Without these materials, the financial support, and the good will of these stewards our library would be a dream rather than a reality. Helping hands are essential in a world that is complex, unpredictable and chaotic – such as the one in which we all now live and in which we provide professional coaching services. We also dedicate this book to you, our readers, with gratitude!

William Bergquist

Suzi Pomerantz

Co-Curators

The Library of Professional Coaching

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Preface

The spark was ignited at the 2012 Santa Fe Conversations. More than three years ago, a small group of experienced and dedicated professional coaches came together in Santa Fe, New Mexico to discuss the future of coaching. In front of a glowing fire, there were many glowing conversations – that led to the formation of our Board of Directors, a new quarterly publication called Future of Coaching [a digital magazine located inside the Library of Professional Coaching (LPC)], and several other initiatives that are in various stages of development. It also led to a decision regarding LPC's celebration of its 500th published document, and our rapid growth towards the vision of a massive, robust, online, open-access resource for the entire coaching community. With so many valuable contributions to the LPC's growing collection, our colleagues at the Santa Fe meeting wanted a way to access the best of the best…in essence, to further curate the curation that is the LPC. Thus, we decided to publish this compilation of LPC's best, and our intention is to make this an annual publication. This very special publication is available exclusively to our patrons, benefactors and sponsors – those women and men who have provided the financial support and good will to keep the LPC going and growing.

You might wonder how the articles in *Curated: 2015* were chosen. It was a difficult selection process. Many people have contributed articles to LPC (more than 200 authors at last count) and many more people are accessing the documents we have placed in LPC (usually more than 1,000 page views per week). The selection process began by dividing the LPC documents into five categories: (1) coaching concepts, (2) coaching tools, (3) coaching support concepts, (4) marketing of coaching services and (5) case studies. We then used the following criteria for the initial sort: (1) *popularity* (the document has been frequently viewed and/or downloaded), (2) *diversity* (of perspective and background) and (3) *length* (some short and some long). We have also restricted the number of documents from any one author (including the two of us!!).The documents in the first and third category tend to be a bit longer (usually 5-10 pages), while most of the tools and marketing documents are short (2-5 pages). We initially selected 10-15 documents for each category (except Case Study, which we treated differently). We then invited colleagues from the Santa Fe meeting to be reviewers of documents in one of the first four categories (we have already picked two documents for the case study category) and their input determined the final selection included in this compilation.

What you have now downloaded is the outcome of this selection process—the best of LPC. We have kept the five categories (each constituting a section of the book) and have included essays of different lengths, addressing different topics and offering diverse perspectives regarding professional coaching and the concepts that provide a foundation for or source of new ideas for this exciting human service field. We hope that you enjoy and find many insights in the documents we have provided, and we thank you for your ongoing support of the Library of Professional Coaching.

With appreciative regards,

William Bergquist

Suzi Pomerantz

Co-Curators

The Library of Professional Coaching

SECTION ONE

COACHING CONCEPTS

Why Coaching Works

Bill Burtch, SPHR, ACC

Coaching is one of the most requested professional development methods of corporate leaders. In a 2001 study by the Corporate Leadership Council coaching was the 5th most requested method for development. In a more recent study by Ninth House, 95% of all the Fortune 500 firms that participated in the study utilize external executive coaches as a part of their leadership development program. So what's the big deal about coaching? Why do companies spend time and money on coaching? Because it works! The Manchester Report, identifying the ROI of Executive Coaching, put the return on investment in the range of 500 – 1000% by those participants it surveyed. In a recent example with one of my own clients, a hotel General Manager, the client was able to increase employee satisfaction/loyalty by 52% and decrease employee turnover by 25%!!

But WHY does it work? How does it get those kinds of results?   Here are five reasons why coaching works:

1. The Coach assists the client in clearly identifying their current and future state. As Stephen Covey says, "Begin with the End in Mind." Coaching helps to clearly define where the client wants to go, what goals they want to achieve, and whether those goals are identified numerically, in behaviors or some other format. Have you ever said, "I'm not quite sure where I'm going but I'll know when I get there?" Coaching helps to identify on the front end where you're starting from so that the course plotted is one that gets you there in the most efficient and effective manner possible.

2. Coaching provides a customized approach to development and goal attainment. This is not a one size fits all methodology. Each coaching engagement is specifically designed for and by that client and coach based on the needs and objectives of the client. Have you ever gone to a training class thinking it was exactly what you needed to make the step in your performance or career only to find that much of

what was discussed you already knew or, when you got back with your bag of new knowledge and skills, you got sucked back into your old habits by the work environment? The customized approach of coaching is designed specifically to address those issues so that it's 100% applicable and offers you the support to implement new skills and behaviors.

3. Coaching is a focused on Action! The objective is to move the client forward towards the identified goal(s). It's about what the client is going to do to get there. Contemplation, self-awareness, knowledge attainment, etc. are often aspects of the coaching process and then it's about what action will be taken based on those gains. When working with a client after determining the goals and objectives he/she wants to achieve, we then turn our focus on the developing an action plan for achieving them. The coach then becomes an accountability partner to help hold you to the actions you agree to undertake.

4. Capacity building is one of the objectives, I, as a coach achieve with clients. The action undertaken is designed to achieve the goals as well as build the capacity of the client. Capacity building is one of the objectives, I, as a coach achieve with clients. Coaching facilitates learning, skill and competency development and does not attempt to deliver answers to the client. Having the client utilize their individual strengths, knowledge, skills and abilities, develop plans, take actions, and become self-sufficient and self-correcting are prime objectives. This is where coaching is different from consulting.

5. Consider having a trusted person working with you whose only objective is to help facilitate your success…no other agenda…Who you can say anything to without fear of it going beyond the two of you…Who is there to listen and offer honest, objective feedback…Who utilizes all their knowledge, skills and resources for your success. This is the coach /client relationship. It is like very few relationships in our personal or professional lives and has the ability to provide an environment for significant accomplishment in an accelerated manner.

The experience of Harmony's coaching clients mirrors the results of professional studies as they site improvements in team effectiveness, productivity, retention rates, employee

satisfaction, profitability, relationships with peers and direct reports, reductions in costs, career advancement, and cost reductions to name a few.

Executive Coaching is a very accessible and time effective development tool (that works) for busy organizational leaders. Is it time for you to incorporate it into your learning and development program?

Philosophical Foundations of Coaching: Ontology

William Bergquist and Kristin Teresa Eggen

In this essay we wish to focus on two dimensions of ontology that hold profound implications for the practice of professional coaching. One of these dimension concerns the static or dynamic nature of one's notion about being. Can we define a state of being that is stable—is "being" a noun—or is any statement regarding the state of being always in flux—is "being" a verb? The second dimension concerns the basic assumption that it is or is not possible to accurately describe and validate a description of reality. Those who believe this description is possible are called "objectivists" and those who believe it is not are called "constructivists." We propose that four ontological perspectives can be identified when these two dimensions are combined. We focus in particular on a dynamic constructivist perspective regarding the world in which coaching clients live and work.

Two events precipitated this article on the relationship between ontology and coaching. The first event was the interview which one of us conducted with Julio Olalla in an issue of the *International Journal of Coaching in Organizations* (Olalla and Bergquist, 2008). The second event was the first meeting between the two of us in Oslo, Norway. During a symposium conducted by the International Consortium for Coaching in Organizations (ICCO), the two of us had a chance to walk and talk together on the roof of the new Opera House in Oslo (a remarkable architectural feat). We discovered that we shared much in common about the interplay between philosophy and coaching, as well as about the challenges of thinking in new ways to meet the unique features of 21st century life.

In our conversations about ontology and coaching, we have encountered a wide variety of definitions and meanings assigned to the word "ontology." While all (or at least most) perspectives on ontology are concerned with one very ambitious undertaking— understanding the nature of being—there are many different turns and pathways that one can take on the way to this understanding. In general, we would propose that there are two interrelated dimensions that help to discriminate among these differing definitions and meanings. One dimension concerns the static or dynamic nature of one's notion about

being. Is "being" a noun or a verb? Are we talking about an object or about a process? The second dimension concerns the basic assumption that it is or is not possible to ultimately identify the basic nature of being—in other words, to accurately describe and validate a description of reality. Those who believe this description is possible are called "objectivists" and those who believe it is not possible are called "constructivists." Four different ontological perspectives are available when one combines these two dimensions (see Table 1).

Table 1. Four Ontological Perspectives

	Static **Notion About Being**	*Dynamic* **Notion About Being**
Objectivist **Perspective Regarding Being**	*Technical Rationality:* **Objective and verified description of a stable reality**	*Platonic Ideals:* **Screened and interpreted version of an external stable reality**
Constructivist **Perspective Regarding Being**	*Societal Inventions*: **Biased and resistant descriptions of reality**	*Contextual Interactions:* **Reality created in the interplay between two of more people and/or events**

While these four ontological perspectives are inherently of some interest to those who are involved with the field of epistemology (study of knowledge acquisition), they are also directly relevant to field of coaching—as Julio Olalla has so ably demonstrated in his work. Coaching is concerned with how clients define their own being—their sense of self. Each of these four ontological perspectives defines one's sense of self in a quite different manner. These four perspectives do not simply involve different belief systems. They encompass different notions about the very nature of a belief system, and in this sense are profoundly different from one another.

Static Objectivism: Technical Rationality

In our analysis of ontology, we would propose that there are two different perspectives regarding the nature of being and, more basically, the nature of reality. One of these perspectives might best be called *objectivism*. The advocates for this perspective assume that there is a reality out there that we can know and articulate. There are universal truths or at least universal principles that can be applied to the improvement of the human condition, resolution of human conflicts, restoration of human rights, or even construction of a global order and community. Donald Schön (1983) suggests that this perspective emerges from and remains closely associated with a tradition that he calls "technical rationality."

We are also witnessing a parallel emergence of what we may call "bio-centrism"—this is an objectivist perspective defining human beings as an objective and stable reality. From this static and objectivist perspective, we begin with the assumption that our identity and our decisions are "wired in" to our neurological structures and basically pre-set at birth. While we certainly should acknowledge that we are not a "blank slate" at birth (Pinker, 2002) we also must realize that much occurs after birth and the environment impacts in a profound manner even on neurological development prior to birth. Furthermore, neuroscientists (cf. Rose, 2005) are coming to realize that the level of complexity in neurological structures and processes make it very difficult, if not impossible, to equate mind with brain. There is a level of analysis that moves well beyond neural structures and well beyond the "wet-mind" (biological base of mind) to a "dry-mind" that is transcendent and perhaps even spiritual in nature.

The bio-centric, objectivist perspective has served us well for several centuries. It has enabled us to make great advances in medical and cultural science; however, this perspective has also created many problems with which we now live. From a bio-centric objectivist perspective, the human body, included the brain, was (and is) perceived as an advanced machine that can be altered and repaired. This perspective can be retraced to the central principles of modernity: determinism and progress. While there is a tendency to coach from this perspective, this is a very limited (and limiting) approach to coaching—especially when the people we are coaching base their notion of "self" and "being" on this perspective – "being" as a given, with some potential for improvement.

Dynamic Objectivism: The Platonic Ideal

While many of the critiques of static objectivism are products of late 20th century and early 21st century thought, there is a much earlier source: Plato offers a dynamic objectivism through his allegory of the cave. Let's briefly visit this cave. According to Plato, we are all living in a cave and never gain a clear view of reality, but instead view the shadows that are projected on the walls of the cave. We live with an image of reality (shadows on the wall of the cave) rather than with reality itself—which makes our sense of reality quite dynamic and a source of considerable tension. Plato, an idealist, notes that we have no basis for knowing whether we are seeing the shadow or seeing reality, given that we have always lived in the cave. Plato thus speaks to us from many centuries past about the potential fallacy to be found in a static objectivist perspective regarding the world—since we can never know whether we are living in the cave or living in the world of reality outside the cave.

Today, we live with an expanded cast of characters in the cave. First, there is something or someone standing near the opening of the cave. It can be cultural or personal narratives that we are met with on our daily life, narratives and perspectives that block out some of the light coming into the cave. Not only don't we actually see reality, there is something that determines which parts of objective reality get projected onto the wall. This is what makes the Platonic objectivism dynamic—for those holding the partition have grown up in the cave, but may hold a quite different agenda from other cave dwellers. There is yet another character in our contemporary cave. This is the interpreter or reporter or analyst. We actually don't have enough time in our busy lives to look directly at the wall to see the shadows that are projected on the wall from the "real" world. The cave has grown very large and we often can't even see the walls of the cave and the shadows. We wait for the interpreter to tell us what is being projected on the wall and what the implications of these images are for us in our lives.

We are thus removed three steps from reality. We believe that the shadows on Plato's cave are "reality." We don't recognize that someone is standing at the entrance to the cave and selectively determining which aspects of reality get projected onto the wall. Finally, someone else is standing inside the cave offering us a description and analysis. We cam hope for a direct experience and we suggest that a coach can assist in this process. Yet, we remained confused about what is "real" and often don't trust our direct experience. We move, with great reluctance and considerable grieving, to a recognition that reality is being constructed for us

and that we need to attend not only to the constructions, but also to the interests and motives of those who stand at the entrance to the cave and those who offer us their interpretations. We must move, in other words, from an objectivist perspective (whether it be static or dynamic) to a constructivist perspective.

Plato's cave and his dynamic objectivism do provide us with the opportunity to gain insights in a coaching session about the nature of the cave, the world that is projected onto the walls of the cave, and the nature and agenda of the interpreters. We should also consider whether or not to step outside the cave (direct experience). Can we actually step outside the cave? How does the coach assist us in stepping outside the cave? Is it safer to remain inside the cave then to venture outside without the help of interpreters? Should we (and can we) face the profound challenge of unmediated experiences? Should (and can) a coach help us by inviting us to step outside the cave and by helping us recognize ways in which we still carry the cave shadows and cave interpreters with us when stepping outside the cave? As we step outside the cave, are we likely to confront some objective reality through our experience, or is the experience itself constantly shifting depending on setting, context, interpersonal relationships and the nature of our own past experience? These questions lead us as coaches and leaders down a path to which Julio points in his interview. It is a pathway toward constructivism.

Static Constructivism: Societal Invention

Social constructivism has offered Western thought quite a challenge (Berger and Luckmann, 1966). Advocates believe that we construct our own social realities, based in large part on societal inventions—the traditions and needs of culture and the social-economic context in which we find ourselves. There are no universal truths or principles, nor are there any global models of justice or order that can be applied in all settings, at all times, with all people. While this constructivist perspective is often considered a product of late 20th century thought (at least in the Western world) the early versions of social constructivism can be traced back to the anthropology and sociology of the early 20th century. Reports from these disciplines documented radically different perspectives operating in many nonwestern societies and cultures regarding the nature of reality and ways in which members of diverse communities view themselves and their interpersonal and group relationships.

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This initial version of constructivism is essentially static, for these social constructions are based on deeply rooted beliefs and assumptions of specific societies and cultures. There are specific communities that espouse their own unique ways of knowing. These communities may consist of people who are living together or people who are working together. Organizations create their own culture and their own constructions of reality. Specific ways of knowing are based on and reinforced by the community and do not allow for significant divergence among those living in the community. Furthermore, while these ways of knowing may themselves change over time and in differing situations, such changes are gradual and often not noticed for many years.

We thus find a constructivism that is static and a process of coaching that focuses on surfacing these stable, but often unacknowledged and very powerful, societal assumptions and beliefs. It is the role of the coach to challenge these assumptions and beliefs and to help clients trace out the implications of these societal constructions for their own actions as members and even leaders of these societies and cultures. As anthropologists and sociologists, organizational coaches should understand something about the culture of their society—or of a specific organization. One of us (Bergquist and Brock, 2008) recently wrote about six unique cultures that exist in most contemporary organizations. Each of these cultures has its own stable construction of reality and is resistant to change. Coaches themselves dwell in one or more of these six cultures, hence have their own biased perspectives that are created by and reinforced within these cultures. Thus, as Julio would seem to suggest, it is critical for coaches to not only help their clients become aware of their social constructions, but also become aware of the ways in which they, as coaches, construct their own realities.

Dynamic Constructivism: Contextual Interactions

While the objectivist perspective was prevalent during the modern era, and is still influencing our notions about "being," the static constructivist perspective often played a role as counter-point in 20th century social discourse. This static constructivism has been a source of many challenges that have upset the modernist stance on epistemology and ethics. The static constructivists have encouraged or even forced many of us to move from an absolute set of principles to a more situation-based relativism. Even greater challenges, however, are present. A dynamic constructivism moves well beyond the stability of broad-

based societal and cultural perspectives. The emergence of a dynamic constructivist perspective represents a revolutionary change in the true sense of the term

Language, narratives and self

Story and performance are hallmarks of dynamic constructivism. We live in a world of constructed realities that are constantly shifting. We live in a world of language, semiotics and narratives. Language is no longer considered simply a handmaiden for reality, as the objectivists would suggest, nor does it construct a permanent or at least resistant reality as the traditional social constructivists would argue. Furthermore, language is not a secondary vehicle we must employ when commenting on the reality that underlies and is the reference point for this language. The dynamic constructivists often take this analysis one step further by proposing that language is itself the primary reality in our daily life experiences. Language, originally and primarily relationship-based, assumes its own reality, and ceases to be an abstract sign that substitutes for the "real" things. Our cave is filled with language and conversations. This is reality—there is nothing outside the cave (or perhaps the cave doesn't even exist).

While objectivism is based on the assumption that there is a constant reality to which one can refer (through the use of language and other symbol/sign systems) and static constructivism is based on the assumption that there is a constant societal base for our constructions of reality, dynamic constructivism is based on the assumption that *the mode and content of discourse and the relationship(s) that underlie this discourse are the closest thing we have to a reality. We are constantly reconstructing our reality because this reality is based on the specific relationship through which we are engaged via our discourse.* We need not stay within Plato's cave, because the relationship and the discourse is itself reality—it is not just a reflection of the reality. The inside and outside of the cave are one in the same thing. The cave doesn't exist. Consequently, the process of coaching becomes a powerful (even critical) process, for it can alter reality for both the client and coach.

Narratives of our time and of our self

We are often distant from many of the most important events that impact on our lives. We live in a complex, global community and we have many connections to a vaster world. Yet, we can no longer have direct experience of, nor can we have much influence over, this world. The cave has grown much larger than Plato might have imagined and may no longer

even exist. The only access we have to this vast world is through language and narratives. As a result, we often share narratives about things and events rather than actually experiencing them. Language itself becomes the shared experience. This perspective does not differ greatly, on first review, from that offered by Plato. The narratives may be considered nothing more than second-hand conversations about the images of the cave's walls. Yet, there is a difference, for the narratives and conversations are not just about experiences, they are themselves experiences.

This sense of a constructed reality that is reinforced by narrative and conversation is a starting point for dynamic constructivism—just as it is a starting point for traditional and static forms of constructivism. The key point with regard to a dynamic constructivism is that each specific conversation is itself a reality. Shared narratives and language are where we actually meet - self and others, self and society, self and shared cultural narrative. From this perspective, our stories about self constitute our fundamental sense of self—they are the building blocks of our identity.

Perhaps our stories about self are everything we mean by the term "self." This would suggest that our stories about childhood, about major adult accomplishments, and about difficult lifelong disappointments may be the basic building blocks of self-image—whether or not they are accurate. Contemporary coaches, like Julio Olalla and David Drake (Drake, Brennan & Gørtz, 2008), emphasize the role of narrative for a good reason—narrative is a very powerful and influential tool. We are profoundly impacted by two often unacknowledged (or even unseen) forces in these narratives. First, we are influenced by the broad-based social constructions of reality which is conveyed through the stories of the society and organization in which we find ourselves. This is the contribution made by static constructivists. Second, we are influenced by a more narrowly based personal construction of reality that is conveyed through stories we tell about ourselves (and perhaps stories that we inherit from and about our family and immediate community).

The hermeneutic circle and use of metaphors
There is actually a third level of narrative which makes the dynamics of constructivism and coaching even more complex and challenging. We are co-creating narratives (and ultimately creating reality) with other people—those with whom we are interacting. All meanings or statements are referring to a system of narratives and semiotics, but this is in itself an open-

ended system of signs referring to signs referring to signs. No concept can therefore have an ultimate, unequivocal meaning (Weaver, 1996, p. 171). We can illustrate this complex, nested dynamic—called the hermeneutic circle—by turning to narratives and conversations that occur within a workplace. For example, once the manager of a specific department has spoken, the reality that was created when she spoke is no longer present. Even if she says the same words, they are spoken in a different context, hence have somewhat different meaning. Thus, even when our manager is "speaking"—in the form of vocalized or written words or in the form of other images (visual, tactile)—these words or images will have different meaning each time they are interpreted. Meaning will shift depending on who hears the statement, what the setting is in which the communication takes place, and which words or images have preceded and will follow these efforts at communication. According to the dynamic constructivists, therefore, reality for the 21st century manager is a shifting phenomenon that is subject to change and uncertainty, meant to be expressed in nuanced, ever-changing ways, again and again, in response to new contexts.

More than ever, our organizations are based on and dependent on these dynamic interpersonal conversations and shifting, context-based narratives. Most people, resources and attention in present-day organizations are devoted not to the direct production of goods or direct provision of services, but to the use of verbal and written modes of communication about these goods and services. Given these conditions, story-telling and narrative are central to 21st century leadership. Stories are the lifeblood and source of system maintenance in both personal and organizational lives. The construction of stories about organizational successes and failures by leaders is critical to the processes of personal and organizational transformation. Clearly, the conversations that are most effective in bringing about organizational integration frequently take the form of metaphors that are conveyed through stories. (Lakoff & Johnson, 2003) Metaphors are used to portray something about an organization—in particular something about leadership, authority, and values. These metaphors are central to the organization, for they contribute to the conversations that are at the heart of the organization. They point to a shared set of signs and narratives, and as such create, recreate and strengthen the experience of shared values.

The stories of an organization are important to fully appreciate for yet another reason: they are critical bridges between the present and past. Organizations exist at the present moment in time. The past life of an organization exists largely in the present conversations, i.e., the

stories about the past. It also exists in the conversations that are now taking place about past conversations (via archival records). The formal records of the organization are the conversations that take place between people who are of the present and the past. Similarly, the organization's future is shaped in current conversations about this future. Narratives actually do more than tell stories, they create a framework in which the identity of the organization is perceived and presented. Story-telling is a central ingredient in relationships. Relationships, in turn, become important in the reconstruction of reality—whether this reality be personal or organizational in nature.

Several questions arise from this dynamic constructivism. In what way(s) do the personal and organizational narratives and images influence or alter one another? Is there a shift in the organization's narrative when a new top manager is hired, or the organization itself is restructured? From the perspective of the coach, there are major concerns with regard to the nature of narrative and identity that is being conveyed by the organization and the narrative and identity of each employee –and in particular the person receiving coaching services

Conclusions

The movement from an objectivist to a constructivist ontology and from a static to a dynamic ontology requires commitment and courage—particularly courage. Our sense of self and reality—our ontological reality—is always in flux. How do we live with this ontological uncertainty? The remarkable theologian, Paul Tillich (2000) has written about the existential (and theological) "courage to be"—the courage needed to acknowledge one's being and one's becoming in the world. If human beings are minds, and not just brains, then they are also inherently spiritual in nature or at least there are spiritual demands being made on them as they are confronted with the challenging universe in which they live.

As spiritual beings, we have the capacity to reflect on our own experiences and to place these experiences in space and time. This is the human challenge, the human opportunity and the human curse of transcendence. Our sense of a constantly reconstructed universe, based in our interactions with other people, leads us inevitably to a sense of bewilderment. At a more immediate level, we are confronted as leaders and coaches with the complexity, unpredictability and turbulence of contemporary organizational life. How does one find the courage to stand in the face of this "awe-full-ness"? And more to the point, what is the role

to be played by organizational coaches in assisting their clients (as well as facing their own personal challenges)?

Note of Appreciation: We wish to acknowledge the contributions made by not only Julio Olalla, but also our colleague, Agnes Mura, co-author with Bergquist of *Ten Themes and Variations for Postmodern Leaders and Their Coaches* (Bergquist and Mura, 2005).

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NO! - An Ontological Perspective

Alexander Berlonghi, M.S.

Coaches will often assist their coachees in respect to the freedom of saying *NO*, or living with their own reactions and emotions when others say *NO* to them. All is well and good in terms of a coachee being empowered to produce certain results in daily conversations at work or home. It's great when psychologically we learn to live in our social environments with increased balance and harmony. However, most coaching and conversation about *NO* has been much too superficial; useful perhaps, for a specific result, but far from a permanent shift in how we are in our everyday world.

There is a point of view that goes deeper – our ontological perspective. What is happening from an ontological perspective with *NO*? That is, for humans, what is the *being itself* or the *living spirit* of *NO*? What can *NO* reveal about *WHO WE ARE* that perhaps is hidden and escapes us in our daily living?

It doesn't really matter if most of us don't remember the first time we screamed "*NO!*" at the top of our lungs. Nearly every child does it at some point. There are many psychological explanations that may vary from person to person, but those points of view have not made much of a difference, especially for the little person in the middle of that moment of high decibel expression. So what is *NO* all about? Is a child's *NO* listened to for what it is, or do we prefer to shift our focus on various explanations for it? Perhaps those child development explanations are really superficial justifications that allow adults to avoid seeing something that is happening more profoundly.

Some will say that after every *NO* there lives a *YES*. Philosophically or poetically that might be a satisfying paradox or polarity to play with or explore, but the attention in the conversation then shifts to the relationship with YES instead of focusing on *NO* itself. *NO* is

so difficult for some of us to stick with, to listen to, or to say! So what is *NO* all about? Let's take a brief look.

The older ones among us in the USA remember when no black person could sit on certain buses, live in certain neighborhoods, go to certain schools, eat in certain restaurants, and use certain bathrooms. What were those *NO*'s all about? In the USA we explain it with descriptive words such as prejudice, segregation, and racism. Elsewhere it has been called apartheid. But if you are that person who actually is living that *NO*, what is *NO* all about?

In those awful times when a person says *NO* to someone's sexual invitations, advances, impositions, or attacks, and the other does not listen to that *NO*, what is happening? The will and desire of one person does not correspond with the will and desire of another.   And what happens touches the victim so profoundly and strongly. What is that *NO* all about?

What happens in the animal world with *NO*? Some ontological coaches maintain that animals do not make such realities as requests and promises because they do not live in time nor have the human capacity for linguistic commitment. Let's take a very quick look at that, as well. Wild animals like mountain lions and elk do what they do without having any existential crises or psychological issues about *NO*. Try budging an elephant or a mule when they simply don't want to move. Those who have attempted to put their domesticated cats into a little box to go somewhere usually are confronted with what we humans would easily identify as a *NO*. What is there in the *being* of an animal's *NO* that we only call instinct as opposed to linguistic? What is an animal's *NO* all about?

Perhaps our looking for explanations, reasons, and justifications for *NO* is somehow related to how we have, for centuries, constituted our being human. What is it in our *being* that reverberates with *NO*?

In order to get to something we do not readily see, we have to remove the veil of talking about choice. This is without a doubt very important in coaching; recognizing the freedom to choose is a monumental step in many people's lives. Reflecting on the ramifications and implications that in our every moment we are making choices opens up new worlds of possibilities for our daily relating and living.   Yet, as important as any conversation about choice may be, it too may limit our truly knowing *NO*. Let's take another look at the

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examples we used above.

A child is a wonderful and adorable little mammal before it learns to be a socialized human. Is the child saying *NO* to losing the naturalness of being lovingly treated and pampered as a cute little cuddly animal? How much of our animal *being* do we put into the closet by only focusing on our strictly human development? While all children rightfully must learn to live in and adapt to our human world and this is the way it is, we may be limiting their *being*. Are children screaming *NO* to a humanly constituted reality that is being thrust upon them by surprise, due to the necessity of learning to relate in a human society? We may merely be insisting on their being human as we have framed it. Perhaps all children know this when screaming *NO* in an animal way. It may not be logical or rational, but it is a knowing. But let's not stop here.

What is happening with respect to *NO* in examples of sexual assault, abuse, or violence that go beyond the imposition of will or desire of one over another? Pleasurable and beautiful human sex is shared in moments of *being US,* as opposed to *being* only *ME or I* versus *YOU*. When this *US* is present, two people are sensuously and sexually sharing and being *ONE* while simultaneously each is having their own experience. The choice to be and act sexually with each other is natural, free, and joyful when two people are being an *US*. When *US* is missing sex is not the same; even for couples who have been together for years. Surely there is no *US* in rape or abuse. And yet it is happening so much in our world. But let's not stop here.

In the humanly constituted realities of interpersonal disrespect and institutional inequality based on skin color, race, and national origin there is clearly no *US*. All children play with and enjoy each other until they have been socialized not to do so in the name of becoming civilized humans. And this is still happening today so much in our world. But let's not stop here.

We humans have had a difficult time dealing with our addiction for explanations of our human uniqueness. Whether we like it or agree with it, our humanity is being reconstituted culturally, scientifically, religiously, and environmentally all of the time. With Copernicus and Galileo we ceased to be a species located at the center of the universe, revered by the sun and stars. With Darwin, we ceased to be the species created and especially endowed by

God with soul and reason. With Freud, we ceased to be the unique species with behavior governed by a rational mind. With the emergence of cybernetics and intelligent computer technology we have ceased being the species uniquely capable of complex manipulation of the environment. But let's not stop here.

Philosophers and psychologists have considered humans to be unique in that we live in time, establish history, give meaning to life, live with the reality of death, and experience compassion and love. This uniqueness becomes useless when we are always rushing or running out of time, resigned about our purpose for being here, petrified about death, and experiencing profound isolation and social fragmentation in our personal and international relations. Early psychological theories of human consciousness have been cast aside by contemporary theories that the entire universe is conscious. The latest interpretation of our human uniqueness is that we live in a world of linguistic commitment, making requests and promises. While animals may communicate, they do not live in language and commitment. But the results of our unique human ability with respect to acting in commitment don't look so great if we consider our economic, social, environmental, political, and diplomatic realities. But let's not stop here.

The topic has not been changed. This has everything to do with what *NO* is all about!   A mule or elephant knows when there is respect, generated in a space of *US*. There are millions of humans who connect with and love animals, and experience this *knowing* profoundly. And while animals may not be linguistic, they don't go against the grain of who they are, forcing each other into being this or that way. Neither do they rape, torture, mass murder, or indiscriminately harm each other.

But where is the ontological perspective in this? Have we missed something?   Let's approach what we have been saying in a different way.

We are not suggesting that we can rid our human being of the concept of the *SELF*. This is deeply engrained and at the moment, culturally untouchable. We human beings have historically constituted a person's uniqueness or essential being by referring to the self. In this psychological perspective the self is the unity of human being. The self is an individual person as the object of his or her own reflective consciousness. This psychology of self includes all of the studies and theories of the cognitive and affective representations of one's

identity or the subject of experience. This has also permeated many religious and spiritual views about who we are, the nature of our own importance, and today's popular teachings about consciousness. However, no matter how earnestly one promotes this, there is no absolute reality or universal truth to it. And it doesn't matter if it is the dominant and predominant perspective. After all, for a long time the majority of humanity also held that the earth was flat.

An ontological perspective recognizes *US* as the unity of human being. Not metaphorically, poetically, ideally, or wishfully. Children in the womb and their mothers are living and relating as a single *US*. This remains so after our children are born, even though there is the appearance of a distinctly existing physical body. In our *being* we are an *US*. It lasts until children begin the profound ontological expression of screaming *NO* in reaction to learning how to be human in the way our human societies have insisted. We teach them to be individual human selves, and then we complain that children are too much *ME, MY, MINE* oriented. After that, they grow up looking for *US* in all their relationships: families, marriages, lovers, friends, brothers & sisters, sports, clubs, favorite hangouts, and even in their teams at work. We start with *US* at conception as a basic ontological unity of our human being. And then we move far away from that with a focus only on our own individuality, consciousness, and self.

This is not a war between *US* versus *SELF,* nor are we making a case for an ontological perspective versus a psychological one. We know the world we are living in has been generated from the point of view of the *SELF* as the psychological unity of human being. We are in the middle of it. Reconstituting our world to include *US* as the ontological unity of *being* is both an opportunity and a distinct possibility.

We humans have been missing the balance and harmony of *US*. When the balance and harmony of a child's *US* is threatened, a *NO* will show up. Sex without *US* becomes oppressive, abusive, and potentially criminal. Even in the normal adult fun of sexual seduction, if there is no *US* there will be a *NO*. If we interact with animals without *US*, there will always be a *NO* to human domination.   All life forms on earth and even the earth itself know how to express *NO* in their own ways. If we would only listen!

This is what *NO* is all about. The coaching context of results in our daily interactions at

home and work is important to continue.   But there is also something important beyond it. The freedom to say *NO* can only be lived with another – when an *US* is already there. When there is slavery, servitude, domination, and a lack of freedom to say *NO,* then there is the denial of the *US* that is always there.

Proposing *US* is not an innovative theory, new abstraction, or transformational distinction. *US* is. *US* is concealed behind the *SELF.*   It is not a pipe dream or fantasy -- *WE* are.

Soliciting the Pre-Mortem and Riding the Change Curve: Coaching Tools, Strategies and Concepts for Effective Planning

William Bergquist

The Nobel-prize winning behavioral economist, Daniel Kahneman, has a very interesting relationship with Gary Klein—with whom he both conflicts and collaborates. As Kahneman notes, in alignment with both Frans Johansson (2004) and Scott Page (2011), great diversity of opinion and perspective is likely to yield creative solutions and breakthrough thinking and analysis—as is the case regarding his relationships with Klein. In his extraordinary book, *Thinking, Fast and Slow*, Kahneman (2011) writes about his extensive and successful use of an analytic tool devised by Gary Klein. It is called "The Pre-Mortem."

The Strengths and Weaknesses of Optimism

Like many of his behavioral economics colleagues, Kahneman points out that optimistic thinking (and the avoidance of analyses concerned with failure, loss and risk) is both a strength and weakness. On the one hand, we get a dose of dopamine when imagining positive and rewarding outcomes. Dopamine, in turn, is a great motivator (but *not* a primary source of pleasure as some neuroscientists in the past assumed). It moves us to a state of activity – rather than the passive state in which we find ourselves when pessimistic and (at a more extreme state) depressed. Chronic depression is actually often linked to the absence of dopamine in our neural system.

Perpetual optimism, on the other hand, can also get us into a heap of trouble. Kahneman other behavioral economists identify several major biases associated with optimism:
  (1) Neglect of the strengths and strategies used by competitors (neglect of the Threat sector in a SWOT analysis)
  (2) Over-estimation of our own individual and collective strengths (neglect of the Weakness sector in a SWOT analysis)

(3) Failure to acknowledge unanticipated impacts on our plans (Nassim Taleb's "Black Swans") (neglect of the unanticipated Threats in SWOT)

(4) Failure to acknowledge that there are unknowns we don't know we don't know (to paraphrase Donald Rumsfeld moment of candor and insight) (neglect of both the Weakness and Threat sectors of SWOT)

(5) Failure to take into full consideration the *change curve* that inevitably is engaged when a new plan is engaged (see my discussion of "change curve" below).

The Pre-mortem Speech and Key Coaching Questions

As a way to address these potential biases of optimism, Klein (and Kahneman) suggest that a pre-mortem analysis be done before the decision is made to venture into new territory (a new project, strategy, way of approaching recurrent problems, etc.). I believe that the pre-mortem can be a very powerful coaching tool and strategy and provide Kahneman's specific and brief description of this process while also offering a set of coaching questions that address the five biases I just listed. First, the quote from Kahneman (2011, p. 264):

> The procedure is simple: when the organization has almost come to an important decision but has not formally committed itself, Klein proposes gathering for a brief session a group of individuals who are knowledgeable about the decision. The premise of the session is a short speech: "Imagine that we are a year into the future. We implemented the plan as it now exists. The outcome was a disaster. Please take 5 to 10 minutes to write a brief history of that disaster."

While the premortem is best done (as Kahneman suggests) with a knowledgeable group, it also can be effectively used with a leader when one is the coach. I would propose that the following coaching questions be asked:

One year from now you are reflecting back on why this venture failed:

(1) What did your competitors do that contributed to the failure?

(2) What ended up not being a strength for you – or it was a strength that was used too often or inappropriately?

(3) What are several possible unanticipated impacts that had a negative impact on your venture?

(4) What were your areas of relative ignorance or your misleading biases? What could you have learned more about before starting this venture? What outside data might you have used (for example, the processes and outcomes of similar projects done in other organizations or done in your organization at another point in time)?

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(5) What did the change curve look like? Was it deeper or longer than anticipated? What could have been done to reduce the depth or length of the change curve (see description of change curve below)?

These are difficult – quite challenging—questions to ask of a leader who is about to embark on a new venture. These questions are directly aligned with (yet also expand on) the spirit of *organizational learning* and *reflective practice* that are often associated with Donald Schön, Chris Argyris and Peter Senge (of *Fifth Discipline* fame). While the emphasis is usually placed on *learning from one's mistakes* and more recently (with the emergence of appreciative inquiry) *learning from one's successes*, there is also the possibility of *anticipatory learning* -- which is what Klein and Kahneman are encouraging with the use of pre-mortem analysis (and is similar to Otto Scharmer's "learning from the future"). This kind of analysis might be a fundamental way in which we contribute to the welfare and success of our coaching clients.

The Change Curve

 At noted in the pre-mortem coaching questions I have proposed, there is a key dynamic element which I have identified as the *change curve*. When advocating any specific change in the life of a person or organization, we typically describe the positive outcomes that will attend this change—especially if we are optimists. A new accounting procedure will cut down on paperwork by twenty percent or a new patient intake procedure will significantly increase both staff and patient satisfaction. While these outcomes might realistically be expected of a successful change effort over a relatively long period of time, we must expect any change effort to have an initial impact that is deleterious with reference to the achievement of these outcomes. A change curve accompanies any attempt to improve a situation.

Let's focus on a particular change curve—and assume that the change effort is ultimately successful, and that members of the organization are willing to wait out the initial drop off in productivity, morale and so forth. What actually occurs during this change curve phenomenon and why does it occur?

At the start of any change, the existing state of the person or organization holds several distinct advantages over the desired state. First, everyone is familiar with the current state. They have confronted it, discovered how it works and, in most instances, come to terms

with it, no matter how bad it is. No one will be caught by surprise. No new demands will be placed on anyone by new people or new situations.

Second, some organization theorists suggest that the current status of any system (person or organization) is, in some sense, meeting at least some of the needs (conscious or otherwise) of all members of the system—especially if the current system has remained relatively stable for some time. The mere fact that the present state is "rotten" serves the purpose, for example, of enabling one to excuse her own current, unsuccessful behavior.

We are all quite skillful at hiding behind the failures of other people or the organizations in which we work: "If only old George wasn't my boss … or "If I could only get a job in a better managed company." "I could finish this task if only this company had a decent personnel policy." "We would be a terrific team in an organization that really cared about our work." The current situation thus holds a distinct advantage over the desired change in that there are few unrealistic expectations about the current situation, whereas the desired change becomes the home for many misguided hopes and dreams, as well as some realistic expectations.

A third advantage which is held by the current situation concerns the proclivity of all systems to remain stable. When we change any part of the current system in order to make this part more efficient, more responsive, more humane or more profitable, then we can expect that other parts of the system also will have to change—even if they currently are working in an acceptable manner. Unless the desired change is trivial, it will set up ripples (if not tidal waves) in other parts of the system that often will not be fully appreciated by members of these parts of the system. Consequently, unless a change effort is truly system-wide in scope, it will tend to meet with local resistance. Even a systemic change effort will bump up against resistance from other neighboring systems, for no one system is an island—rather it is always one component of an even larger meta-level system. From this perspective, one begins to fully appreciate the pessimism of many organizational theorists about the prospects for real, lasting change.

Why then is any change effort begun? It is begin because, in some essential way, the current situation is intolerable. It is better to try something than to accept the current circumstances as givens. Thus, the impetus for change is persuasive and enduring. We embark upon

planned change, typically, because the alternatives—no change and haphazard change—are unacceptable.

Initiating the Change: What occurs when the change has been initiated? First, things are disrupted. An *unfreezing* process is essential to any planned change effort. At the individual level, we can speak of the transitional periods or psychic limbo states that intercede between more stable periods in the lives of adults. During each transitional period some fundamental assumptions are questioned and the existing life structure is reappraised. Previously dismissed options and possibilities for change in oneself and in one's world are now given credence. For the first time, we hear voices from other rooms in our psychic structure and consider profound changes in the way in which we encounter our world. Whether engaged in organizational unfreezing or personal transitions, people are forced to adjust and learn when first initiating change. This is often a painful and consuming process. Participants in the change understandably begin to focus more on their own coping and their own learning than they do on the task at hand. They become introspective: old memories, hopes and fears often are evoked as people being changed seek out the stability of the past amidst the new values and behaviors. The old boundaries between home and work often are broken, as are many interpersonal constraints and traditional role differences (teacher and learner, young and old, male and female). Many change efforts will open up new perspectives that seem on the surface to have little to do specifically with this change. Change processes and learning often are not very discriminating.

Because of unrealistically high expectations and the often distracting learning that accompanies most change efforts, the productivity of a person or organization during periods of change will drop off, as compared with performance levels established prior to this change. Accompanying this drop off is a reduction in morale: the "new day" has not yet come; in fact, the "old days" are looking better all the time. At least there were fewer problems in the old days that were so unpredictable and difficult to solve. This drop off in morale often further exacerbates production problems, which in turn further lower the morale. A vicious cycle has been started which can leave an individual or organization in a rather long-term depressed state.

Sometimes when a change is introduced it will yield a short-term boost in productivity and morale—the so-called *Hawthorne Effect*. While the actual Hawthorne Studies involved the

investigation of many different aspects of worker motivation and performance, they are best known for an early finding that workers will try harder because they are involved in an experimental program or, more basically, because they have been singled out for special attention of some type—this has commonly been labeled the Hawthorne Effect. People try harder because they are involved in a new venture—particularly if they have some psychological or financial stake in the outcome of this venture. If the decision to initiate the change was difficult to make, then people will also attempt, for a short period of time, to work toward its success, or at least ignore its initial failings, in order to reduce the cognitive dissonance associated with this difficult decision. The proverbial donkey that is caught midway between two haystacks of equal size is not only likely to vacillate between these two stacks, he is likely also to focus on the positive attributes of the haystack that he finally does choose and to identify and dwell on the negative attributes of the haystack that wasn't chosen.

This post-decision tendency to justify one's choice often will give any change effort an initial boost. This boost usually is short-lived, however, especially if there are people involved in the change effort that prefer the other haystack and would benefit in some way from the failure of this change initiative. Most importantly, the tendency to ignore negative implications of a chosen course of action, once the decision is made, will itself often contribute to the downturn in productively and morale, for problems associated with a change effort often will be ignored until they become particularly difficult to resolve. The "bugs" in a new website, for instance, may be overlooked during the pilot test phase because those involved in the program want it to succeed and therefore ignore these "trivial" difficulties. The true extent of the problem only becomes apparent when this website is accessed by all of the operating units of the company or by customers.

Responding to the Change: What typically happens after this downturn in productivity and morale? People involved in the change will either wait it out, to see if productivity and morale improve over time, or panic and decide either to return to the old way of doing things or institute yet another change. If the latter course of action is taken, then a particularly vicious cycle often is set in motion, for another change effort will institute yet another change curve—further reducing production and morale, leading to yet another change, another change curve and so forth. Very soon, this person or organization will suffer from the effects of uncontrolled change. A tailspin will ensue. Performance will

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become increasingly variable–in systems terms this is called "oscillation". It usually precedes and is indicative of the system's death.

At the very least, a system in which change itself has become a problem will experience a long term drop off in productivity and morale which may falsely be attributed to the first of the change efforts or to a whole series of decisions about change, rather than to the process of change itself. Thus, the Dean of a School of Medicine will complain about her "bad luck" in selecting four Assistant Deans over a six-year period who did not work out. The Manager of Glassware in a large department store will complain about his Assistant Buyer's choice of a new line of stemware that didn't initially sell very well, leading to a reorganization of the stemware display, which, in turn, led to an overall drop in stemware sales.

If a decision is made to return to the pre-change state, then a person or organization has benefited very little from the change effort. The same old problems remain unsolved. Those who formerly were optimistic about solving these problems through change are now disillusioned, because the change didn't work, or embittered, because the change was never given an adequate chance to succeed. New problems may be added to the list of old problems as the person or organization attempts to make up for the drop in productivity and morale that was produced by the change effort.

At the very least, this person or organization is much less inclined to initiate another change in the near future. Frequently, we find that those people who are now the recalcitrants in an organization—resisting any and all change efforts—were formerly those who advocated change, but found that their change efforts were unsuccessful or, more frequently, never given a fair test. Thus, when we abort a change effort in the middle of a change curve we may be creating employees who will be hindrances to change efforts in the future. When a change effort is stopped in mid-stream, the future options and resources of the person or organization in adapting to changing conditions and responding to complex problems are reduced. This person or organization has become immobilized—stagnated— by its premature rejection of the change initiative. This premature rejection is based, in turn, on a failure to anticipate, identify and understand the change curve phenomenon.

Deciding Whether or Not to Initiate Change: Because of the negative consequences associated with an aborted change effort, it is better for a person or organization not to

undertake a major change effort if this person or organization is unable to see this change through to the end. One should keep open the option of stabilization as well as change when leading an organization. To paraphrase a passage from *Ecclesiastes*: for everything there is a season -- a time for change, and a time to refrain from change.

What then are the conditions under which one can sustain a change effort through the period of disillusionment and disruption? First, people who will be involved in this change effort must recognize that the change curve is likely to be present. They should not immediately judge the worth of a change effort, but wait instead until there has been ample time for the system to adjust to this change.

Second, people who are immediately involved in the change effort should be sufficiently committed to this effort to give it a good try. If the change effort has been initiated without adequate consultation with those who must enact the change, then the change curve is likely to be long-term and debilitating. There will be no Hawthorne Effect to provide an initial boost in morale and productivity. Nor will there be much motivation to continue with the change, once the disruption sets in. Typically, those people who were not consulted about the change will push for a return to the status quo (producing stagnation) or will push for another type of change (producing the vicious cycle of repetitive change).

Third, the person or organization must be sufficiently "healthy" to live through the disruption of change. Ironically, major change efforts often are most successful when they are not really needed. Under conditions of crisis, a person or organization often is unable to live with the change curve, hence will return to the status quo or initiate another change, which hopefully will be immediately successful. Since the latter hope is rarely realized and the return to a former crisis state is rarely gratifying, the stress on a person or organization is usually intensified by a change effort.

Fourth, a change curve can be successfully endured if the person or organization sets realistic deadlines and high but realistic goals for the change effort. In other words, adequate planning and evaluation must precede and accompany any successful change effort. This is where the pre-mortem analysis conducted by a group or offered by a coach can be of great value. The change curve must be anticipated in setting up deadlines and timelines for program planning, initiation and review. Formative, nonjudgmental

evaluation of the change effort may be appropriate at a relatively early point in the change effort (for example, one to two months), while more judgmental, summative evaluation should not occur until the change curve can be expected to be on an upturn (usually four to six months after the start of a major change).

If the goals for a change effort are not clearly formulated and if adequate assessment of current resources has not taken place before the change is initiated, then one will rarely be able to sustain commitment over a long changeover period, nor make critical judgments concerning an upturn in productivity and morale at the right point during the change effort. One should be able to set a time for program review prior to the start of a change effort. While this review date might be open to some adjustment as the change effort unfolds, one should be able to determine at some point relatively early in the life of a change effort if the downturn in productivity and morale is about to end or has ended. If the downturn continues or if productivity and morale level off at a low level, then a decision should be made to explore the reasons for this failure and to revise the change program, initiate a new program (based on lessons learned from the current change effort) or return to the previous status (with a new appreciation for its positive attributes and/or with suggestions for less drastic modifications in its structure).

These then are the central ingredients to keep in mind when initiating or encouraging others to initiate a major change effort:
- awareness about the change curve, commitment to the change decision
- capacity to sustain the system during the change
- adequate planning for and monitoring of the change effort.

Stabilization and the Change Curve: If awareness, commitment, capacity and planning are not present, then stabilization may be a more appropriate strategy than change. During a period of stabilization, one can encourage those involved in the potential change effort to become more fully acquainted with the dynamics of change and development—especially the change curve—while also working closely with these people to build their commitment to the change.

During a period of stability, an individual or organization may wish to do a better job with current resources, structures, procedures and so forth, in order to build up a capacity to

sustain the disruptive effects of future change efforts. An HRD department may wish to work through its own internal human relations problems before seeking to help other departments work through their human relations problems. A high school teacher might wish to become a better lecturer or discussion leader as a precursor to learning how to conduct simulations or role-plays. A sales force may wish to become more intimately familiar with its current product line before taking on a new sales strategy involving an expanded portfolio.

Similarly, before embarking on a major change effort, an individual or organization is well-advised to build up its planning and evaluation capabilities. This is why the pre-mortem analysis makes so much sense. Any effective response to the change curve phenomenon requires a relatively long term planning perspective, as well as sensitive program monitoring and evaluation. No person or organization is likely to sustain commitment to a change effort, under conditions of reduced productivity and morale, unless there also is commitment to the benefits of long-term planning. Unless one is convinced that the monitoring and evaluation of systems now in place can do an adequate job of telling us, at an appropriate time, whether or not this change effort should be sustained in its present form, there will rarely be sufficient patience to wait out a change curve.

Conclusions

The muscles of a skillful change effort must be complemented by the eyes, ears and mind of careful planning and evaluation—by thoughtful pre-mortems, post-mortems (and mid-stream mortems). Otherwise, the change effort becomes a sightless and mindless force that unintentionally destroys people and organizations. Frankenstein monsters are often created by those well-meaning agents of change and optimists who are insensitive to change curves and their implications.

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Lew Stern Interview: Research on Professional Coaching

Interview Conducted by Bill Carrier

Bill Carrier: Lew, thank you again for investing some of your time and talking about the research that you've done, and your experience and insight on research in general. I'm looking forward to this conversation.

Lew Stern: Thank you.

Bill Carrier: I thought we would start out by taking a quick look at your background. Can you help us understand a little bit about what you're doing and your portfolio of research?

Lew Stern: Sure. I'm not a researcher. What I am is an organizational consulting psychologist and business consultant, and also very heavily involved in the development of the professional discipline of coaching. Since I am a scientist, I believe that any professional discipline needs to be based on what you know from data that is scientifically derived as opposed to just hearsay. As such, coaching needs to be evidence-based and data-based and research-based.

As a result, I've become significantly involved in driving what kind of research gets done and how it gets done within the coaching field, especially the executive coaching field, the leadership and organizational coaching field. I've also been deeply involved in the standards for coaching and the standards for the education and training and certification of executive coaches, as well as in the dissemination of information as the field of coaching quickly and continually morphs.

Yes, I do research, and I'm always doing some kind of research in coaching, but my primary focus is the practice of coaching with senior-level executives and their teams, both in the for-profit and especially—and now primarily--in the not-for-profit sectors, especially in the areas of environmental preservation and in promoting the peaceful resolution and

suspension of conflict on an international basis, and in the quality of life especially for those in greatest need.

I do education and training; I speak, I write articles, I write books, I do research, and that's all in my spare time. In my regular time in my semi-retirement, I am also selecting clients, a few of them in best-in-practice, mostly for-profit organizations who really are committed to doing the right thing and doing it the right way; and on leaders and best practices, for example in financial services, in biotechnology and pharmaceuticals, in medical delivery, in scientific research, those kinds of situations. Some are also in the delivery of consulting and coaching services within the nonprofit sector, especially institutes, research institutes, NGOs and nonprofits that promote change making and change leadership for the benefit of worldkind, for the future generations. That's pretty much what I do.

I started out thinking that I was going to be a clinical psychologist, a clinician. I got a PhD in educational and counseling psychology, and, in fact, did clinical work in the 1970's. At the same time I was doing organizational work and doing coaching and consulting with leaders and potential leaders, and found that work in organizational systems was much more stimulating and much more fitting to my style and interests and energy.

After several years, I stopped doing any work in the clinical arena and primarily focused-- with the mindset of understanding individual differences, human development, developmental psychology, interpersonal relationships, team dynamics, organizational dynamics, all areas I learned as a psychologist--as a consultant and coach in organizations on an international basis. That's primarily what I've done in the last 37 years.

As I was doing that, the field was really emerging. There was very little in the field when I started in '76, and came back to Massachusetts, Boston, after going to grad school and working in Minnesota. I found that most people didn't even know how you could apply, for example, psychological principles in organizational settings, so I ran the first workshop for the Mass Psych Center on applying psychology in organizational settings.

There were very few people involved in this space. My mentor was Harry Levinson, one of the grandfathers of organizational psychology and emotional health within the workplace. My father-in-law at the time was a business executive and owner and he mentored me from

the business side. Meanwhile, I taught courses in graduate programs in business and organizational psychology and behavior.

Then I found that, every step I went, there were missing frameworks for professionals to learn. I was a cofounder of the New England Society of Applied Psychology, because there was no group to come together and share best practices in this region. I was a cofounder of the Graduate School Alliance for Executive Coaching because there were no standards for the education, training and certification of executive coaches on an international basis. I cofounded The Executive Coaching Forum to develop our competency model and a handbook of standards for all players in the coaching partnership--the executive, the boss, the HR professional and the coach. The Handbook is available online in its fifth edition.

Then there's the Institute of Coaching at Harvard. I've been a senior advisor since the founding of that, to help drive their mission to build the discipline of coaching from research to practice, supporting research that can be applied within the practice of all coaching, including personal life coaching, wellness coaching and leadership and organizational coaching.

There have been many other things. I founded the only graduate program in New England in executive coaching and ran that program after developing the curriculum and bringing together and managing the faculty (at the Massachusetts School of Professional Psychology). After five years, I decided to move into the Institute of Coaching at Harvard to help drive the development of its strategy of building the professional discipline through research and bringing together an association of coaches from around the world who are committed to those ideals.

I think that probably explains where I've been. It's definitely my professional life--and I have a much bigger life that is even more important to me in my own family and around volunteerism within the international community and my local community, as well as playing with my grandchildren, dog, and friends. I live on the ocean, so there's kayaking and exploring the environment, preserving the environment and many other activities that I get involved with, because life is short and life is fun.

Opportunity to Partner

Bill Carrier: It's so characteristic of you, Lew, being so involved in stewardship--and not just of the profession, but of your own life.

Lew Stern: If we only try, right?

Bill Carrier: Trying and trying again is more than half the battle. You've done something interesting. You've bridged this divide from practice into doing research. It's been said occasionally about research that there are practitioners and professors, and never the twain shall meet. You've mentioned this a little bit, but please just speak more directly to how that happens for you and what has animated it.

Lew Stern: I think is a real opportunity on an international basis to do this, to build a partnership between research academicians who understand how to do research and the practitioners who have the daily data-gathering that needs to be organized. Many of them have already gathered data; they just don't know what to do with it or have the time to do it.

It turns out that just because of personality and style and natural strengths and inclinations and all the rest of it, the people who tend to like to practice don't have a lot of interest or patience or whatever it takes to do really good research--and yet they're very interested, most of them, in really using their practice to understand what works. They're looking for patterns. They want to know how they can contribute best practices with others and share the same thing and get the same thing from other practitioners.

For me, I've always collected data. Every time I work with a client, I gather. I always anonymize all of my data. Whenever I do assessments and the 360s and I meet with the client, every time I meet, I have very structured notes of what I did to intervene and assist the client to discover things and decide what they're going to do, and to implement those and experiment and try those things. Then I log what worked and what didn't work, and I keep notes of all that.

For the 1,000 to 2,000 coaching clients that I have had—and I have much of that data, and I'll speak for myself: I have done very little with that data. I did one research study for my own practice, and took 25 clients that I had worked with over a period of a year who were senior

executives. I tried to identify what the patterns of their presenting situations and their strengths and what their goals for coaching were, and then what the results of the assessments were and what the results of the 360s were, and then what coaching approaches we used and which worked and which didn't work. Then, what kind of results did we get at the individual, the team and the organizational level, as well as business measures? Then I followed up six months later to see what kind of sustained results were derived.

I found that 75 percent of the people that I coached were promoted or given expanded responsibilities within six months of the coaching, but I didn't do enough with the data, or I didn't have enough time ... And that's one of the things. If you're a coach, you don't have a lot of time. It's a very time-consuming profession, as an executive coach. You're spending a minimum of typically ten days, eighty hours of work, to coach an executive over a period of six to twelve months.

To then take all of what you learned and structure the research to be able to take that data and look for patterns and control it in such a way that you can compare that with the people who haven't received coaching, so that you can actually generalize it and do some random sampling, so that you know that it's not just because of your being the coach but because of what happened in the coaching in certain situations, I just don't have the time to do that.

That's probably the case for most practitioners, but there's an opportunity for a partnership between the researchers and the practitioners: to be able to use the time and the expertise of the researchers on how to design the "experiments." They can design the research around what is coaching, how it's done, by whom, with whom, in which situations, with what kinds of results, measured in what ways. They can include what periods of time with what sustained results, and what the options are, and where there's a good match, and does it make a difference if the coach is certified or has a certain kind of background.

All those things, we don't know any of that. Even with all the research that's been done, we don't know any of that, so as a potential discipline, we're really in our infancy.

Now, we've learned some things, over the last five years especially, having to do with the diversity of what's going on, especially in executive and leadership and organizational coaching, around the world. One thing that we know in general is that people are doing

coaching in very different ways. They're calling it coaching, but meaning very different things in different parts of the world. Some of it includes mentoring, some advising, some consulting. Some of it's focused on mindfulness, some of it's focused on self-awareness, some of it is on skill building, some of it is on habit change, some is on organizational development, some on intervention, some on relationships. And everybody's calling that all one thing: coaching.

Coaching means many things to many people, not only in different parts of the world and of the United States, but also in different disciplines within the United States and then in different parts of the world in the same way. There's a multitude of things that people are calling executive and leadership and organizational coaching, or executive coaching. Here's a critical consequence of that imprecision: When it's hard to agree on what it is that we're going to include in the research, because we all have different definitions, it's very hard to know even what kind of research to do with whom.

Then comes the design of how do we do that, how do we get the real experts in research? Because I'm a PhD and I was trained as a researcher, I happen to understand, to some degree anyway, what is good research design. I'm familiar with what are good qualitative and quantitative studies, and things like when do you use control groups, how you can do that, what kind of statistical analyses you should be able to do to make it generalizable, so that we can interpret what is applicable in one situation versus all situations, or at least to what degree can we generalize findings.

I understand that, so there's where I bridge, as a lot of other people who have backgrounds in social sciences or medical science, or anthropology. A lot of people in coaching have backgrounds that include research expertise, and they can be bridges between the experts in research and the experts in practice. They're doing practice, they're doing a little bit of research, and they understand research enough to connect the two. Does that answer your question?

Research in Coaching History
Bill Carrier: Very much so. You've been talking about this particular bridge between practice and research, and I know that you've written about the difficulties in research on coaching. Can you help us understand a little bit about, first, how you got involved in the idea of

research broadly serving the field of coaching? I know, for example, you were involved in the ICRF, the Institute of Coaching Leadership Forum at Harvard, which was convened to set up an agenda and guidelines for research that would help advance the field. Then I'd like you to talk a little bit about your own research into the research.

Lew Stern: Absolutely. Where would you like me to start?

Bill Carrier: Probably at the ICRF, and please mention the Dublin Declaration as part of that.

Lew Stern: Sure. It was about six or seven years ago. There was sort of a rumbling, sort of an undercurrent across and especially within English-speaking countries, but in other countries as well, that somehow we needed to come together. There were pockets of people doing research and defining coaching and training coaches and setting standards, and starting to do the kinds of things that it takes to build a professional discipline. Coaching was, as the article in the Harvard Business Review said "the wild west of coaching." And it was the Wild West because there were few rules and standards. Everyone was just going into coaching.

It was a fascinating field. It gave focus and opportunity to people who were good as helping professionals, at working with individuals and groups to help them understand themselves. People entering the field could support clients in understanding what they wanted to accomplish, to make decisions and to set plans in motion, to develop their capacity and to improve their performance-- to have an impact and influence on the results of their organization or their community or their family or whatever it might be.

There was that rumbling. So a large group of people came together in Dublin for a forum of people who represented ten different categories of what was going on in coaching. They were leaders of about 250 people who had been meeting virtually as multidisciplinary and international teams for a year, having teleconferences, to talk about each of those ten categories. For example, the ten categories were things like the definition of coaching and the training and education of coaches, research in coaching standards of coaching practice and the measurement of results--all those kinds of things that would go into moving coaching into a more professional space and into a more evidence-based space. Evidence-based simply meaning that we wouldn't just do things by guessing what might work, but

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that we would actually have data to support that it would be more likely to work, and that you were accountable to your client for best practices.

That was the field of coaching emerging. I think it was five days long in Dublin, in Ireland, and basically what we did was to share the work of the ten teams and what we learned. We gathered statements for each of those ten areas about what the status was, where we were, and what needed to be done to move it to the next step.

We then put together a declaration based on our experiences and our interactions as a group of professionals from around the world, which included academicians and practitioners and trainers and certifiers and you name it. Given the involvement of that relatively representative group of people, we asked ourselves: What do we declare about where coaching is? Where does it need to go? What are the priorities and stages of how we need to make that happen? That was done, and that document and supporting white papers are available online.

Research Forum and Institute of Coaching
Then as a result of that--and also there was a second process going on simultaneously--the people who were more into research were also asking what kinds of research and what research topics were of highest priority.

That group, with the leadership of Carol Kauffman, who had been at Harvard for many years, identified that there was a need to form an academically-based, research-driven institute at a well-established, well-respected academic institution.

The Institute of Coaching was being formed. There was a need to pull together leading researchers in coaching from around the world five years ago at what became the first meeting of the International Coaching Research Forum (ICRF). I was fortunate to be part of that Forum. Each of us shared a view of where the field was, where research was and what we saw as the priorities of where it needed to go. Then we spent several days literally brainstorming planning, given all the data that we brought with us, what we knew and what we didn't know, and what we needed to find out through research and what kinds of research needed to be done.

We came up with a hundred different topics that needed to be researched. That list is available online. In fact, many of these resources, including the Handbook of Coaching and this list of the needs for research in coaching and the different journals—they are all available at the instituteofcoaching.org.

As a senior advisor to the Institute, I'm a bit biased, but the Institute of Coaching really is the only academically based organization that is driving coaching research to practice. It is an enormous resource for anyone who cares about doing evidence-based coaching and getting involved with research and coaching, best practices in coaching, and what have we learned. There are tele-classes and master classes and tutorials, as well—many ways of accessing information and research. I encourage people to join the Institute's Professional Association to get access to all of these resources.

There is a lot of research going on in the field of coaching, and one thing the Institute has been trying to do is to provide financial resources, with the support of the Harnish Foundation, to allow people to get small grants to support the research that they want to do. What the Institute is now moving into even more is a proactive role in driving the agenda for what research needs to be done.

The Article

Bill Carrier: You and Sunny Rostron collaborated on an article about that topic recently, surveying the written research in coaching and coming up with some important conclusions. Can you tell us more about that?

Lew Stern: Sure. Anthony Grant published his bibliography in 2011 of what research had recently been done in coaching. The extensive bibliography did not restrict itself to just peer-reviewed journals or original research. It was on anything having to do with coaching.

Sunny and I decided that we would take a deeper look at peer-reviewed research published in journals from many disciplines. For our research, we took the 100 original topics that the ICRF suggested for research and, through a systematic analysis; we organized the 100 topics into 16 categories of research that needed to be done.

In our review of the research, we included all the peer-reviewed articles we could find on the web in a wide variety of publications. Anthony Grant came up with hundreds and hundreds of references on all the articles that had been written. We came up with more than 200 research articles that had been written which were either not included in Tony Grant's work or had been done since he published his bibliography and weren't included in his research. There were almost 90 peer-reviewed journals that had published original research in coaching in the last five years. They're in every discipline you can imagine, from psychology to coaching specifically, to medicine, business management, organizational development, human resource development, education and training, finance and economics and other disciplines, even construction management, the Journal of Engineering, the Journal of Safety Research, the Journal of Social Work Practice, the American Geriatric Society, and Leadership in Management and Engineering.

ICRF Categories of Research

We did an analysis of the 100 questions originally asked at the ICRF and came up with 16 topical categories. We did our research to find out the degree to which each of those categories of the 100 questions had been studied since they were raised at the original ICRF meeting.

Had they been answered? Had there been any research in those topics? If you like, I can get into what those topics were, just to give you a flavor of them. Would that be helpful?

Bill Carrier: Yes, it would be very interesting.

Lew Stern: Okay. I'm going to run through them very quickly, but you'll get a sense of it. One topic is coach education and training. Is it being done, where is it being done, how is it being done? What's the curriculum, who are the students, what kind of results, how long does it take? Those who are certified, do they get better results than not?

The coaching relationship, how do you define it, and what goes on for chemistry building and matching between a coach and a coachee? And does it matter if there's a gender similarity or difference, and how about style and the background of the coach in the relationship?

Then, regarding coaching outcomes, how are those measured and what outcomes are being followed, and what do clients care about when it comes to outcomes? Are their outcomes sustainable, and are they outcomes of well-being and outcomes of lifestyle and outcomes of organizational effectiveness and business results, depending upon the kind of coaching?

Coaching in organizations specifically: who's doing it, which organizations are doing it, why are they doing it? Who's getting it within the organizations, how are they structuring it, how are they managing it?

Then specifically about the coach, what competencies are needed, are developed, and what are the characteristics and practices of coaches? Regarding certain characteristics and competencies and practices and compassion--what makes a great coach versus a good coach versus an incompetent coach, when it comes to actually having the kinds of results that clients are looking for?

How about the coaching process? Is there any pattern around how people actually do a flow of what goes on from the initial contact between a potential coach and coachee to the ending of the coaching? We need to find out. Is there best practice around coaching processes, or are there best practices in different situations?

How about research methods in coaching? Do any research methods work better than others? What is being done and what isn't being done, and where is it being done and how is it being done? By whom?

How about supervision? It's a critical area, because you can't expect to go to a certificate program and be ready to handle any complex coaching situation without supervision, just like you couldn't if you were a teacher or a physician or an occupational therapist or anything else. You need supervision, so is there supervision going on, and if so, what goes on in that supervision? What does a supervisor need to have to be competent, and what is the process of supervision?

The business of coaching: how has coaching been professionalized with policy, ethics, governance, identification of business trends, pricing, et cetera.

How about the difference between coaching and what's done in therapy, versus counseling and versus mentoring? That's another category.

How about how coaching differs by geographic area, internationally? The models, the theories, the activities, the assumptions, the processes?

And then there's a lot of work being done in peer coaching. Is peer coaching going on, where has it been going on, where is it going on? It's happening a great deal in academia, we know that. It is happening a lot in organizations; it's happening a lot in religious organizations, so is peer coaching happening in coaching? Where is it happening, how is it happening?

The contracting process is very important. The agreement between an individual and their coach or an organization and an individual and their coach: what is included in that contracting, and what makes for better coaching where there are less conflicts that could get in the way of the result?

How do we know that someone is ready for coaching, and that they're not ready for coaching: what criteria are used to evaluate readiness? How is the decision being made on who is coached and not?

How is assessment being used? Is it worthwhile doing, and if so, what kinds of assessment and data gathering, such as standardized instruments, observation, 360's, et cetera?

Finally, the last area is the impact of coaching on society, and that's the area that matters most to me, because we can do all of this and it's nice to have an impact on one individual, but wouldn't it be nice for coaching to have an impact on the crazy world that we're living in? Saving the planet from this self-destruction and from killing each other, and supporting a quality of life for all the poor people in the world and the people going through war in every part of the world? Wouldn't it be nice if coaching could have an impact on the people who influence the state of the world and the survival of our planet for generations to come?

State of Research Now

Bill Carrier: When you're starting to look at all of this research across four and a half years, at all of the peer-reviewed articles about coaching research, what did you find?

Lew Stern: The good news is that there's a little research going on. The bad news is there's very little, and it's not systematically being managed, so most of the questions aren't being addressed. Basic research is not being done, so we don't know what the shared definitions are. We don't know how coaching is defined in different parts of the world. We don't know what is going on in the coaching room or on the teleconference when people are doing coaching. We don't know the actual dynamics.

We don't know whether or not it's getting the results. We don't know what results are being measured. We don't know whether or not a coach with one kind of background and certain kinds of training and certain competencies does any better on certain results than any other kind of coach. We don't know what kind of impact the organizational system or a person's life system has on outcomes and the degree to which a coach needs to understand that in order to help the individual. We don't know what processes work better than any others. We don't know whether or not there are certain things about contracting that can increase the efficacy of coaching.

We don't know what research designs would give us the most efficient and yet most useful results, and internationally we don't know the impact that coaching is having on societies.

We do know that a lot is going on, but the research that has been conducted has not systematically gathered that data to know what is going on in what parts of the world with what kinds of results.

The good news is we know that a lot of people are doing a lot of good work. Most of that work is focused on measuring psychological results. We know, for example, that if you look at most of the controlled research studies in the peer-reviewed journals, most of the work is on the coaching process. The two topics that are being researched most are the coaching process and coaching outcomes.

If you look at how many studies have been done in this time period, the coaching process represents, from 2008 to 2012, more than 100 studies total in more than 80 journals where they were published.

Again, this is peer-reviewed original research; not just what people are writing about what they think. If someone submits a research article of original research, then the people who are reviewing to see whether or not it meets the standards for professional research, the people who are reviewing the submission, don't know who submitted the article, so it's a blind review.

In those peer-reviewed journals, there were only basically 100 studies in five years having to do with what goes on in coaching, and a little over 40 about outcomes and not quite 30 about coaching in organizations. There were about 20 articles about coaching versus other helping practices and how they differ. Then you go down the line regarding other categories of research and the numbers get smaller and smaller and smaller. So there were several hundred articles total over five years, but basically only two or three of the original 16 categories that were identified by the International Coaching Research Forum out of that list of 100 topics have had any significant coaching done.

One of the interesting things we found was that the largest number of articles that have been published were primarily in coaching psychology, psychology and coaching journals, but there were a bunch of other publication venues. If you look at the articles that have been published around the coaching process, roughly 80 of them were in psychology or coaching journals, about 25 in coaching journals and a little more than 50 in psychology journals. But there were also almost 10 in medicine, more than 10 in business, and several in human resources and in education and training. So one thing that we learned from this diversity is that coaching really is a multidisciplinary field, that the people who are doing coaching and that are studying and researching coaching come from many different fields.

I did another research study through interviews with a colleague of mine, Doug Riddle. We interviewed coaches from 25 different disciplines, from art to music to psychology to anthropology to sociology to medicine to education. The coaches we interviewed had originally been trained in those disciplines and then got into coaching. We wanted to see

whether or not their models and their practices were different--and they were absolutely different.

It was fascinating. There were some commonalities, but the way someone with an art background—and an artist's mind and an artist's standards and processes and models—approaches coaching is very, very different from the approaches of someone who's from psychology or education or sports medicine, or a physician or a therapist. It's fascinating—we don't have any research to substantiate exactly what are the differences…and do those differences impact the process or impact of coaching.

Where to Go From Here
Bill Carrier: I could probably write an entire article just about this part of the conversation, but I want to be respectful of your time, too. I know we've got about five more minutes. It's such wonderful content. How would you like to spend these last five minutes? What have we not addressed that you'd like to address?

Lew Stern: I guess the most important thing to me is: where do we go from here? If research is going to do what it needs to do to help coaching move in the direction of being a more professional, evidence-based discipline, where coaches have data to substantiate that what they're doing is the best that they can be doing with their clients, what do we need to do? Here are my recommendations, and the recommendations that Sunny and I came up with.

First of all, we need to do much more research. The amount of research that's being done is actually going down. It picked up in the mid-2000s but since 2008 less peer-reviewed original research was conducted through the first half of 2012. One, we need to beef it up, and we need to get more practitioners and researchers working together to do real research, both controlled studies and non-controlled studies. What we need to do is systematically find out who's being coached, by whom, in what ways, with what results, and what factors are affecting the results and the satisfaction and the impact of the that coaching.

Number two is we really do need to expand the variables that we're studying when it comes to results. Since psychologists have become, or primarily have been, up until this point, the primary drivers of the research, the outcomes that they're primarily looking at—not only, but primarily—are outcomes like depression and anxiety and happiness. Also, they're

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primarily focused on individuals, they're primarily psychologically oriented, and the results that are primarily being measured are through standardized psychological testing.

What we're not measuring is the impact of a leader on business/mission results. We're not measuring whether or not, over a period of a year, whether, literally, a person's physical well-being is better. Does their vagal tone get better? Does their blood pressure go down? There's a happiness scale that's often used, and that's very positive, but does that happiness lead to a life that is more productive?

We need to look at the different specialty areas of coaching, like life coaching, personal coaching, executive coaching, motivational coaching, wellness coaching, coaching with people with special needs, coaching in the sports arena. These sub-disciplines of coaching all need to do research in order to be evidence-based and be responsible to their clients.

Next, we've produced a bunch of research, but we're not doing it in a systematic way. Somehow we need to come together again, and perhaps approach the path through other sources. We need to set some priorities by the people who are actually going to do the research. Right now what is happening is that people tend to be doing research where they have the clients available to study. There's very little random sampling going on, and there's very little in the way of control groups, so we can't generalize either within coaching groups or across situations and geographic regions.

We can't just be looking at the general coaching process. We need to be studying what the coach is actually doing at the micro level. We're not doing that yet. We need to do things more systematically, more internationally, sharing results.

The certification programs need to be doing more research. They have a large array of people coming in, and what they're not doing is systematic research on what backgrounds those people come in with, what competencies, what styles, what strengths, and where are they at the end of the certification training and then where are they six months later. What kinds of coaching have they done and what impact has that had.

We also need to be focusing on the larger impact on the system within which people live and work; so not only the impact of coaching on the individual, but also on their

relationships and their families, organizations, and their communities and society as a whole. That's where we need to get involved with looking at where is society, and who are the influencers and potential influencers on the future of our society. We need to proactively focus our coaching where it can have the greatest influence to have the biggest impact on the future for generations to come. Socially responsible coaching is a critical aspect of this, and there's practically no research being done on the impact of coaching at this societal level.

In short, we need more diverse research, better coaching research, more involvement of the practitioner and partnership with the researcher, better studies that are more controlled with random samples and control variables, and then more people publishing. More research—and then the actual practitioners actually looking at that research and using it to build their practice, not just doing what their gut tells them is the right thing to do.

Coaching Impacting People

Bill Carrier: We just started talking about how research into social impacts is a critical question and one that has been pretty much untouched, and it brings me back to where we started, which is how much you personally are working in this area, both as a coach and as a steward of the profession. Your sharing this information right now is a great example of what you're doing, in order to help others have that social impact.

Lew Stern: I appreciate that, and thank you. What I need to let you know is that there are many talented people who are doing as much or more than I am to steward the coaching professional discipline. There are unbelievably wonderful, dedicated people who are giving of their lives, literally. I know coaches and coaching researchers who have moved to Africa, India, South America, so many parts of the world, into impoverished areas for months every year of their lives, to help build coaching within communities for people to coach each other. Many of these coaches are going into countries that are war-torn, putting themselves in danger so that the leaders of those countries can stop wars. I know people who are spending most of their lives not getting paid to identify opportunities for making a difference by using coaching to save our planet for future generations.

The one thing that I'd like to say, in my closing anyway, is that coaching doesn't just have to be a professional discipline. Coaching is an unbelievable resource for every one of us to use

every day in our lives, with the people with whom we interact in our personal and in our work lives.

We know from research that compassion makes a difference; that looking someone in the eye makes a difference; that unconditional regard makes a difference; that helping a person discover things on their own instead of telling them makes a difference; that coaching someone so that they operate primarily in their parasympathetic nervous system helps them so they are not on guard and they stay more open-minded to possibilities.

We know some of those things already, but it doesn't have to be done just by professional coaches. The opportunity, the biggest opportunity, is for every one of us to coach each other. Every day, when we have those end-of-the-day conversations with our partners or with our kids or with teachers, other people that we know or someone on the street that you meet, or someone at your religious organization or in your neighborhood. We can stop and do more than listen. Coaching is more than listening. There is a great potential to apply coaching with each other to change the world one person at a time.

Bill Carrier: You managed again to bring it back to how other people are doing coaching—a gracious and big-picture perspective which seems characteristic of your approach. Thank you!

Lew Stern

Dr. LEW STERN has over 35 years experience as a leader, management consultant, executive coach, organization and leadership development specialist, and consulting psychologist. He focuses on helping boards, leaders and their teams develop skills and strategies and change their organizations and how they run them. He has worked with hundreds of leaders and would-be leaders to improve their leadership and accomplish their business and mission objectives on a very practical level.

Services
Lew provides a wide array of consulting and coaching including: Customized 360-degree feedback for leaders, executive coaching, leadership assessment and development planning,

on-boarding consulting, succession planning, and development for high-potential leaders.

Demonstrated Results

His past research has demonstrated 75% of his coaching clients to have been promoted or given expanded responsibilities within a year and doubling of the typical retention rate of leaders assigned to new positions.

Publications and Presentations

Lew has written many publications and presented at major conferences not only in leadership development but also in quality assurance, process reengineering, customer focus, interpersonal communication, team development, and the potential social and environmental impact of coaching.. His most recent books are Executive Coaching: Building and Managing Your Professional Practice (Wiley, 2008) and the 5th Edition of The Executive Coaching Handbook.

Leadership Experience

He has served as President of Focus Consulting and Stern Consulting, Vice President at ODI, Senior Vice President of Manchester Partners International, and Executive Director of the Foundation for International Leadership Coaching.

Thought Leader in Leadership Coaching

Dr. Stern serves as Senior Advisor to the Institute of Coaching at McLean Hospital, Harvard Medical School and has a faculty appointment as Clinical Instructor at Harvard Medical School. He is a Co-Founder and Past President of the New England Society for Applied Psychology, and Co-Founder and Co-Leader of The Executive Coaching Forum. He was a Founding Board member of the Graduate School Alliance for Executive Coaching and founded and served as the Director of New England's only Graduate Certificate Program in Executive Coaching (at the Massachusetts School of Professional Psychology). Lew served as Director of the Annual Boston Conference on Executive Coaching for five years. He is a member of the International Advisory Board of the International Coaching Psychology Review and on the Editorial Board of Coaching: An International Journal of Theory, Research and Practice.

Selected Client List

Fidelity Investments, Federal Express, American Express, AT&T, Omgeo, Johnson & Johnson, Rohm & Haas, Tufts Health Plan, State Street Global Advisors, Millennium Pharmaceuticals, Brown Brothers Harriman, Northeastern University, Rogers Corporation, Boston Scientific, Pulmatrix, Wellington Management, as well as many other leading organizations in the retail, telecommunications, technology, hospitality, healthcare, educational, and non-profit sectors.

Education

Lew received his B.A. with Honors from the University of Massachusetts in Amherst and his M.A. and Ph.D. in Psychology from the University of Minnesota. Dr. Stern is a licensed psychologist in Massachusetts and a Certified Health Care Provider. He has served as an adjunct faculty or guest lecturer in business, management, and organization behavior and development at many colleges and universities.

Lew is networked with many other consultants, coaches, and coaching and consulting firms and organizations. These collaborative relationships allow him to refer to or bring in leading coaches and consultants with special backgrounds and from different locations across the U.S. and around the world. His consulting network provides a depth and span of consulting resources while ensuring special attention and high quality for each of his client projects.

A Commitment to Global Sustainability

A significant portion of Lew's time is dedicated to pro bono consulting and coaching of leaders of non-profit, government, and international non-government organizations who are committed to environmental sustainability, peace, and quality of life.

SECTION TWO

COACHING TOOLS

Book of Universal Wisdom

Charles Smith

Here are some excerpts from a Book of Universal Wisdom translated so people can practice it.

1. Do something you are afraid of and watch something wonderful happen.

2. Every day, write down the main way you will be today.

3. Take something you do that doesn't work and do the opposite.

4. Make one unreasonable request a day.

5. Instead of figuring it out, ask five people what you should do.

6. Spend five minutes paying attention only to your breathing.

7. Consider something currently impossible and what you could do to make it possible.

8. Acknowledge two people today for what they have done or what they are committed to.

9. Ask someone or a group if they will listen to you, and then speak.

10. Look for what's missing which if it were present would make a big difference.

11. Look for what's missing that gets what's missing to be missing.

12. Listen with deep appreciation for the feelings and experience of others.

13. Until you get to a root cause, keep asking, if not for what basic cause this performance problem could be eliminated?

14. If you knew you could not fail, what would you do?

15. Commit to the Success of someone and notice the difference in your relationship and support for their performance.

16. Imagine that Work and Love are the Same. Now what?

17. Practice Possibility Thinking

18. Practice Beginners mind

19. Control only the Context and let people develop their own material.

20. Today, forswear Rule Driven Creativity

21. Kindness is not a guarantee of continuing employment

22. Rules change with each surprise

23. Making peace with paradox and contradictions

24. What is sacred?

25. What is worth living for?

26. What is worth dying for?

27. What is spirit made of?

28. What is a breakthrough you will commit to?

29. Ask, If only I could?

30. What are the dragons you will slay?

31. What unreasonable requests will you make?

32. What do you say to yourself about yourself that explains your lack of achievement?

33. What is your favorite way of playing small?

34. What do you want to see that you don't already see?

35. What's the context from which you want to fulfill your life?

36. If the angel of death gave you three months to live, how would you spend the time?

37. What's the question, the answer to which would solve my problem?

38. What's missing that get's what's missing to be missing?

39. What is the story of your life?

40. What are you avoiding?

41. What do you attract?

42. What attracts you?

43. What do you attract?

44. What is your unreasonable request?

45. What is your request?

46. What is your promise?

47. What are your Declarations?

48. What are you afraid of and are you willing to do it?

49. Where to transform something by distinguishing content and context?

50. What's the awful truth?

51. What's missing in Your relationships?

52. What's missing in Your performance?

53. What is your Dream of the Earth?

54. What do you want?

55. What is your true purpose in life?

56. What true commitments are being thwarted?

57. Where is alignment missing?

58. What would move you from good to great?

59. What more could you do to make you an "A" level performer?

60. What conversations are missing? Relationship? Possibility? Opportunity? Action? Breakdown?

61. Do you live in a real or an appearing world?

62. If you could not explain it, what would you do?

63. If one moment were not connected to the next, what would you do?

64. Who are you?

65. Why should I listen to you?

66. How will you make money for me?

67. Who that is really credible will endorse you powerfully?

68. Upon saying what no, does the future you want depend?

69. Where are you grasping?

70. How much do you want to sell and do you mean it?

71. How do you want to sell it and do you mean it?

72. Are you willing to put up with all the crap with people and breakdowns and do you mean it?

73. What's missing for you that you think I might have?

74. What's missing for me that I think you might have?

75. What is there to celebrate about your world?

76. What is working well around here?

77. What are you avoiding?

78. In what truth is the opposite equally true?

79. May I coach you?

80. What do you get you don't want?

81. What do you want you don't get?

82. What battles, if they were won, would change your life?

83. What would you do if you knew you could not fail?

84. Who are you?

85. What are all prior attempts at solution and what do they have in common?

86. What is the possibility I am inventing for myself?

87. What is a context in which all of this can resolve naturally?

88. What is your request for coaching?

89. What needs to be measured?

90. What is an uncharacteristic domain/context for you to operate in?

91. What power do you need in your life?

92. How do you block your connection with people, work, ideas, the mystery?

93. What are you aware of?

94. What is the Fourth Wall you need/want to break?

95.What stops you from listening?

96.Always release, Do not grasp

97.Be both the storm and the ship

98.Embrace each moment one by one

99.Love and work are the same

100.Are you in this together or not?

101.All mishaps should be transformed into the path of enlightenment.

102.Are you Listening to the little wise voice in your head?

The Clearness Process:
A Coaching Tool

William Bergquist and Agnes Mura

The clearness process, as a coaching tool, offers a gentle way in which a professional coach can encourage increasingly deeper reflection on the part of their client, without violating the basic premise of this peer-based approach that one need not be an expert or authority to be helpful to another person in an organization. All one has to do is be an active listener and provide a balance between challenge and support. The clearness process encourages active listening and provides both challenge (the questionnaire process) and support (offering help to a client who faces a difficult problem). Following are some questions that can be used in conjunction with this clearness process.

The Clearness Coaching Questions

Domain of Intentions: The Desired State
- How would you know if you have been successful in this endeavor?
- What would make you happy?
- Who else has an investment in this project and what do they want to happen?
- What would happen if you did not achieve this goal?
- What would happen if you did achieve this goal?
- What scares you most about not achieving this goal?
- What scares you most about achieving this goal?

Domain of Information: The Current State
- What are the most salient facts with regard to the circumstance in which you now find yourself?

- What are the "facts" about which you are most uncertain at the present time? How could you check on the validity of these facts?
- What are alternative ways in which you could interpret the meaning or implications of the facts that you do believe to be valid?

Defining the Problem: Gap between Current and Desired State

- How do you know that there is a problem here?
- To what extent do other people see this as a problem? If they don't, why don't they?
- How long has this problem existed? How big is it? Is there any pattern with regard to its increase or decrease in magnitude?
- What are the primary cause(s) of the problem? What is different when the problem does and does not exist? What remains the same whether or not the problem exists?
- Who benefits from the continuing existence of the problem? In what ways do you benefit (even indirectly) from the continuing existence of this problem? What will you miss if and when this problem is resolved?

Domain of Ideas: Reducing Gap between Current and Desired State

- When has a similar problem been successfully resolved? What can be learned from this previous success that applies to the present problem?
- What appropriate ideas have been proposed about resolution of this problem? What are the elements ("seeds") of these proposed ideas that are insightful, intriguing, inspiring?
- What "outlandish" ideas have been proposed about resolution of this problem? What are the elements ("seeds") of these proposed ideas that are insightful, intriguing, inspiring, appropriate?
- How might you test out one or more of the proposed ideas before full scale implementation? What can you learn from these pilot tests?

Background

In the Quaker tradition, an assumption is made that consensus exists in any group when it convenes and that the process of finding consensus is one of uncovering this underlying agreement rather than somehow creating a consensus among constituencies who are inherently in a state of disagreement. Similarly, the Quaker tradition suggests that individuals hold the answers to the problems that they face and need only uncover these answers. They don't need assistance because of an absence of a solution to the problems they face; rather they need assistance in gaining greater clarity regarding the nature of this problem and the solution(s) they already possess that will solve this problem. As Ralph Waldo Emerson—the great American essayist—asked when greeting an old friend or acquaintance he had not seen for a while: "What's become clear for you since we last met?" In the deeply-embedded American tradition of blending optimism, pragmatism and individualism, Emerson believed strongly that each individual possesses the capacity to solve his or her own problem, provided there is clarity.

The clearness process, like the consensus process, engages a community of people who are committed to a specific set of norms about how they will relate to one another. Specially, in the case of the clearness process, a person who faces a problem convenes a group of people to do nothing more than (and nothing less than) asking probing questions regarding the problem over a two to three hour period. Members of this clearness committee are not to give advice nor are they to ask leading questions that subtly (or not so subtly) imply a specific definition of the problem or a specific solution.

Though the clearness process has most often been used in small groups, it is equally appropriate for use in the professional coaching process. First, the clearness process' assumption that the person with the problem also holds the solution to this problem is in keeping with the executive coaching focus on strengths rather than weaknesses. Second, the clearness process is a wonderful way in which to encourage reflection on the part of the executive colleague. The problem remains with the client, rather than being transferred to either a consultant or counselor who begins with the assumption that their client or patient can't him or herself come up with an appropriate solution.

Instructions for Use

A coach first explains the purpose and conditions of the clearness process, emphasizing the basic assumption that a clear sense of the problem and viable solutions to the problem reside with the executive client. Their role as coach is to help their client discover this inherent sense of the problem and solutions. A coach then asks their client to describe the problem as they now see it, as well as identify any solutions that already come to mind. The reflective coach should remain relatively inactive during this initial problem description, asking questions only to help him/her (the coach) better understand the situation. Finally, the reflective coach begins to ask questions that help their client clarify the nature of the problem they face. In keeping with the analysis we offered above a set of questions that usually touch on one of three domains: (1) the desired state (the client's intentions), (2) the current state (the client's perceptions of the present state of affairs) and (3) the nature of the gap between the current and desired states (the client's definition of the problem).

The clearness process will then tend to shift toward the uncovering of solutions. This uncovering may occur while the problem is being described and explored—or it may even precede the exploration of the problem. It is not for the coach to control the flow of the clearness process. Rather the reflective coach continues asking questions that move with rather than impede the client's own "natural" way of exploring the problem. We offer a sample of questions above that can be helpful in this regard. These questions all encourage a fresh look at solutions to the problem and encourage one's client to probe deeper into his or her own ideas regarding potential solutions. Executives often limit themselves in considering nontraditional ideas, in part because they have been "right" so often in their life that it is hard to risk being "wrong." The coach provides a safe and supportive environment in which to articulate and explore these "wrong" and crazy ideas and in which to consider parameters of the problem and solution (time, resources, authority) which have always been on "the back burner" for this harried executive.

More generally, the clearness process provides a safe setting—a sanctuary—in which a coaching client can reflect with another executive regarding the nature of a problem and its solutions. It is safe not only because the coach is accepting and supportive, but also because the coach is not intruding his or her own ideas. When we impose our ideas as colleagues, then the recipient of these ideas must acknowledge them, find something good about them

(so that our feelings aren't hurt), and—if we have been particularly helpful (in terms of giving our client considerable time and attention)—plan some way in which to make use of these ideas (even if it means that the solution is unsuccessful). All of this distracts our client from the real task at hand which is to find a solution to his or her problem, not to the newly created problem (making us feel good about our assistance). The clearness process is simple, straightforward and often very helpful in a genuine way for an executive client who has requested our assistance. It is a valuable tool for the professional coach.

Address Your Stress: Simple Techniques to Try

Jodi Michael

Most individuals view stress as the result of external forces when, in fact, the issue is internal. Stress is a conversation. It's not about what is going on in your life or your work; it's about what's going on in your head. The good news is, if you change your perspective, you can profoundly change your experience. Correspondingly, you will change your stress level, efficiency, productivity, energetic capacity and mood state.

When you're feeling stressed, negative self-talk is created, repeated and eventually internalized. Thoughts like "I don't have enough time" and feelings like "I have a constant weight on my shoulders" are debilitating perspectives on many levels:

- Psychologically, they create the feeling of being overwhelmed.
- Physiologically, they produce a catabolic chemical state and sap you of energy.
- Pragmatically, they decrease productivity because everything, even small tasks, can come to feel daunting.

To better understand how to control your stress level, consider the following formula:

Your thoughts create your moods.
Your moods create your behavior (or lack thereof).
Your behavior creates your results.

If you don't like the results you are getting (e.g., stress, anxiety, deliverables that are unfinished), what you need to change is the root cause—your thoughts, which are the drivers that are sabotaging the results.

Within any difficult situation lies tremendous opportunity for growth, learning and even transformation. During stressful times, even very independent individuals will be open to new perspectives, experimentation and unorthodox solutions. It's a window when coaches, therapists or even books can provide a powerful intervention that will impact and influence

so deeply, it can systemically alter how you see the world and how you navigate life forever.

The next time you're feeling frazzled, try using the following behavioral, mental and physical stress reduction techniques. Play around with them. Have fun. Use one at a time or a combination. Discover which techniques work best for you.

Behavioral Strategies

▪ **Practice saying "no."** Overscheduling yourself is a surefire path to feeling stressed and overwhelmed. To achieve a more balanced, peaceful, authentic life, one of the most important words you can add to your vocabulary is "no." You may have trouble using this word because you worry about hurting others' feelings, appearing as though you're not a "team player," or even seeming like you're weak. However, by respecting your limits, setting boundaries, and prioritizing your commitments, you can better achieve what is really important to you and find extra time to devote to relaxing activities.

▪ **Adopt a healthy lifestyle.** Some amount of stress is unavoidable, but by incorporating regular exercise, a healthy diet and at least a few close friendships, you can structure your life in a way that helps you better relieve stress and stay healthy.

▪ **Consider your job fit.** How well do your strengths and interests fit your current job responsibilities? For example, do you like to focus on the details or the big picture? Do you prefer flexibility or structure? Are you more comfortable working as part of a team or on your own? Does your current job stimulate and excite you? The more closely your strengths and interests line up with your life's work, the happier and more fulfilled you will be.

▪ **Break every 90 to 120 minutes.** Research shows that our capacity to focus and be productive diminishes greatly after 90 to 120 minutes. So, set a timer or phone alarm and break up your work day by simply switching activities for 10 to 20 minutes. Grab a snack and recharge, listen to music, take a walk—it will help you return to your task rejuvenated and refreshed. Be sure to set the alarm for your break time as well, as we can easily lose track of time when we're doing pleasurable things or procrastinate to avoid returning to the "grind."

You can also use this strategy to break your day into chunks of time. Use short chunks to take care of less time-consuming "to do" items that start to add up. This small but steady approach can help keep ongoing tasks from overwhelming you.

▪ **Control interruptions.** Studies indicate that you lose, on average, 20 minutes of productivity every time you are interrupted. Therefore, silence the cell phone, ignore text messages and stop checking your emails (turn off the volume so you can't even hear the emails arriving in your inbox). Instead of responding to these as they come in, set aside time to check and reply to them. For example, you may choose to do this once an hour or perhaps after you have completed each of your priority tasks. Let's not kid ourselves—most things can wait.

▪ **Start with what you least want to do.** Avoid stressing about the hardest, most dreaded or most time-consuming tasks on your list by completing them first. This accomplishment will give you a boost of energy and confidence to attack the rest of your "to do" list.

▪ **Break it down.** When you think about all that you need to accomplish, it can seem insurmountable. Make it less intimidating by breaking down projects into individual tasks. Write each task on an index card, organized in order of priority. Each day, set aside time to tackle at least one card and discard it when complete.

▪ **Unclutter your space.** Whether it's at your office or in your home, clutter can drain both your energy and time. For example, how much do you stress about your messy house, especially when you have guests coming to visit? Or how long do you spend looking for your keys every morning, sorting through piles?

Here's a strategy to try—focusing on one room of your house or one area of your office at a time, separate your things into four boxes: to keep, to store, to donate and to throw away. Unless you need it or love it, consider pitching it.

▪ **Read a book.** One of the easiest ways to get a new perspective is by considering another person's point of view. Read a book on the topic of stress management, such as one of the following:

- "The Relaxation & Stress Reduction Workbook" by Martha Davis, Elizabeth Robbins Eshelman and Matthew McKay

- "Stopping: How to Be Still When You Have to Keep Going" by David Kundtz

- "Time and the Art of Living" by Robert Grudin

- "The Simple Living Guide: A Sourcebook for Less Stressful, More Joyful Living" by Janet Luhrs

- "Your Money or Your Life: Transforming Your Relationship with Money and Achieving Financial Independence" by Vicki Robin

▪ **Delegate. Delegate. Delegate.** Both at work and at home, you really don't need to do everything, do you? Make a list of everything you hate doing, errands someone else can run and mundane things that another person can do after some minimal training on your part. Then, sit back and watch relief set in and time open up.

▪ **Create systems and processes.** Create a standardized grocery list for shopping each week. Set up a bill payment system in your calendar and pay bills online. Create a "home" for everything so you can find items quickly and put things away robotically. Have things delivered—your groceries, dry cleaning and whatever else you can. Houseclean in 10-minute chunks to tackle this ongoing task in a systemized, efficient manner. At work, develop a filing system for both electronic files and hard copies that makes it easy to locate documents at a moment's notice.

Mental Strategies

▪ **Mental "staycation."** In order to avoid or overcome negative feelings, refocus your mind on positive images. Visualize yourself in a safe, peaceful nature setting—lying on a hammock at the beach, walking through a bamboo forest, hiking past a waterfall, etc. It can be made-up or real. Use all five of your senses—what does this place look, smell, sound, taste and feel like? Go through each sense slowly. Revel in the beauty that surrounds you. Savor the smells attached to the location. Lose yourself in the experience. Just a few minutes are all you need to recharge.

▪ **Try meditating.** The exercise of focusing your mind reinforces the principle that you have the power to choose your thoughts. As you practice meditation, you will notice that you have certain thoughts over and over again. In fact, most of your thoughts today were your

thoughts yesterday; they are habitual patterns. By becoming more aware of these patterns, they will begin to lose their control over your life. And meditation doesn't have to be performed while seated in the lotus position; you can meditate while walking, running, eating, etc. "With regular meditation, a person feels more focused and calm in [his or] her life, more capable of making new choices in the moment, and less prone to engage in struggle and reactive responses."[1]

▪ **Identify and minimize negative thoughts.** Often, people get caught in a pattern of negative thoughts. They tell themselves, "I'm so overwhelmed" or they ruminate about the past and worry about the future. This increases the production of negative hormones in the body and initiates and maintains the feeling of being overwhelmed.

Here are the ABCs of managing your mood state:

A: **Awareness**. When you catch yourself thinking negatively, stop and bring yourself back to the present moment. By all means, don't beat yourself up for having negative thoughts. Be gentle.

B: **Breathe** diaphragmatically (see below for instructions).

C: **Check** your perspective. Ask yourself, "Is what I am saying to myself helpful? Is what I am saying true? Or is it a negative opinion without evidence?" For example, if you catch yourself saying, "I'll never get this done on time" (opinion with no evidence), shift to asking yourself a question that begins with "*What can I do right now to* move this project toward completion?" or "*How can I* approach this task more effectively?"

Physical Strategies

▪ **Breathe.** Hands down, the fastest way to slow your body's physiological stress response is to engage in deep diaphragmatic breathing. While breathing in through your nose, concentrate on filling your belly with air like a balloon. Hold your breath for a count of 2, then, exhale slowly through your mouth until your belly flattens. Breaths should be at a ratio of 1:2, with exhales about twice as long as inhales. Try counting to 4 as you inhale, hold for the count of 2, then exhale to the count of 8. Continue this pattern for at least 60 seconds.

▪ **Progressive muscle relaxation**. While lying down or sitting in a chair, focus on tensing one muscle group at a time for five to seven seconds each, starting with your head and face. Once you release the tension in a muscle group, then concentrate on relaxing it for 20 to 30

seconds. If a specific muscle is hard to relax, practice tensing and relaxing it up to five times. Work your way down your entire body, repeating the process over and over again.[1]

▪ **Get a good night's sleep.** One of the best things you can do to beat stress is to invest in a good night's sleep. However, when you've had a stressful day and finally lie down to sleep, your mind may race with thoughts of all that you still need to do. To help fall asleep and provide for a productive tomorrow, try the following exercise. Think of a topic, such as U.S. cities. Then, work your way through the alphabet by naming a city that begins with each letter. If you're still awake by the time you reach "Z," work your way backward through the alphabet or begin with a new topic. This repetition focuses your thoughts and fatigues your brain.

▪ **Eat protein throughout the day.** Your brain needs it. This will help your concentration, energy and staying power. We've all had the experience of food rejuvenating us or draining us. Refuel thoughtfully. Choose foods like nuts, peanut butter and high-protein bars to keep your brain working at its highest capacity, especially during busy days.

A Worthy Investment

Stressful events present the opportunity to shift the lens through which you view the world. To a great extent, you can't control external forces, but you *do* have the power to choose how you react.

By practicing stress reduction techniques on a regular basis, you will be better able to tolerate and respond to future challenges. Consider it an investment in your health, happiness and well-being.

Source

[1]Davis, Martha, Elizabeth Robbins Eshelman, and Matthew McKay. *The Relaxation & Stress Reduction Workbook*. 6th ed. Oakland: New Harbinger Publications, 2008.

10 Goal-Getting Mind-steps

Suzi Pomerantz, MT., MCC.

Forget goal setting and go for GOAL-GETTING! Anyone can *set* goals. It takes rigor and discipline and committed action to *get* your goals once they are set. Setting them is the easy part. Making them a reality requires having the mindsets and attitudes, beliefs and alignment to passionately move each day in the direction of your intended results.

Here are ten steps for how you can get your goals:

1. *Unreasonable Outrageousness*: The first step is to know where you're going. That means dream your biggest, wildest dream and from there cast your vision. The best vision is unreasonable, outrageous, enormous and powerful.

2. *Reasonable Realism*: Then you can begin the task of setting reasonable, realistic goals that align with your unreasonable, outrageous, enormous and powerful vision. These goals should represent the steps to get to your outrageous vision. What will it take? Who will you need to be?

3. *Shaping the Win*: In order to know down the road if you've accomplished the goals you've set for yourself, you must first have a specific, measurable, clear intended outcome. You will need to define for each goal your success indicators, criteria for completion…how you'll know if you've done it. What will you see, feel, hear, say, do, believe, encounter once you've gotten that particular goal? What will it look like when it's done and how will you be able to tell it's done?

4. *Recording Your Intentions*: Which simply means, write them down. Just thinking of your goals is not sufficient. Write them, even if you don't look at your list again until the end of the year (or decade), just the act of writing them down programs the goals into your mind, cells, and *being.* Besides, it makes them more real and gets them outside of you, which is almost as strong as a public declaration for setting our intention of accountability.

5. *Public Declaration*: Ever wonder why stating something publicly makes it real? You're not married until you say "I do". Saying it in front of an audience is a commitment that allows those outside of you to participate and hold you

accountable. To get your goals, it is crucial to set up a system of accountability. Whether you make a public declaration, post it on Twitter or Facebook, or simply tell your coach/boss/spouse/employee/friend is up to you, but you have to get it outside of yourself beyond writing it down. You have to share it.

6. *You Can't Be Trusted*: You cannot be trusted to fulfill your own intentions when the stakes are meaningful and high. That's not a criticism, it's simply one of the pitfalls of being human. If you want to get your goals, you must enroll support partners. These folks have the duty of keeping you on track and not letting you off the hook when you make excuses or find really compelling reasons not to do what you said you wanted to do. You will always let yourself off the hook, which is why you can't be trusted with this. Get outside support!

7. *Anchor, hook and storyboard*: Even the best-laid plans can go awry. We find so many ways to sabotage our dreams and ourselves. You must determine a compelling "so what" for why you want to achieve that goal. It can be a mental image, it can be a physical result, it can be a feeling you hope to achieve, but there must be some anchor that is so powerful it can be the hook that re-motivates you to aligned action. Create a storyboard or a vision board for yourself and the outcomes you seek as a visual reminder of where you are going so that when you get stuck you can easily get yourself re-inspired.

8. *Yes You Can!* If you believe you can, you will. If you believe you can't, you are correct. Give yourself permission to succeed.

9. *Trust*: One of the key mindsets for success is to consciously let go of attachment to *how* it has to happen. Keep your focus on the outcome and trust that it *will* happen. Eliminate any desire to control how it happens.

10. *Keep On Keepin' On:* Even if it is just baby steps, do something every day towards your goal. No action is too minor. Be in constant action. Focus on mindful action being fully present to your action each day.

Don Hutson, co-author of *The One-Minute Entrepreneur*, in his blog post on mapping out goals said it best:

"Studies prove that if you methodically and purposefully set goals you will increase your chances of leading the pack. You can't just work hard on your job — you must factor in

working hard on yourself to turn untapped capabilities into the currency of results. A recent study revealed that only one-half of 1 percent of the employed American workforce has their goals in writing. Despite the myriad distractions we endure today, we need to get focused on what is possible. The means by which we program our subconscious minds for higher achievement is to have written goals and resolutions that increase our commitment and probability of achievement threefold. If we write them down and assign a time frame for accomplishment, we quintuple our resolve and results."

How to Create an Attitude of Gratitude

Maynard Brusman

Gratitude unlocks the fullness of life. It turns what we have into enough, and more. It turns denial into acceptance, chaos to order, confusion to clarity. It can turn a meal into a feast, a house into a home, a stranger into a friend. Gratitude makes sense of our past, brings peace for today, and creates a vision for tomorrow. **- Melody Beattie**

Happiness and Success

I believe the key to happiness and success in life and work is to be *thankful for the gifts you have received. You tap into positive energy and generate optimism about future possibilities.*

It starts with being grateful and a prosperity mindset. *Abundance will flow into your life and work when gratitude flows from your heart.* You will experience more joy, love, peace, and happiness.

Gratitude Mindfulness
Appreciating others and saying thank you is good for your health and peace of mind. A large body of research on positive psychology and happiness suggests that developing an attitude of gratitude can improve psychological, emotional, spiritual and physical well-being.

Recent research indicates that people who frequently feel grateful have increased energy, more optimism, increased social connections and more happiness than those that do not. Grateful people are less likely to be anxious, depressed, self-absorbed and greedy or suffer from substance abuse. They are economically better off, sleep better, exercise more regularly, and are more resilient.

The research is part of the "positive psychology" movement which focuses on strengths. Cultivating gratitude is a form of cognitive –behavioral therapy focusing on changing peoples' thought patterns which can positively affect their moods.

As simple as it sounds, gratitude is actually a complex emotion that requires self-reflection, humility and empathy for others. Being grateful requires a shift in mind-set from negativity and blaming others focusing on problems, annoyances or perceived injustices to appreciating and giving credit to others.

Gratitude is essentially being aware of and thankful for the good things in our lives. We consider the things for which we are grateful; we count our "blessings."

Psychological research indicates that the experience of gratitude makes us happy, and that the regular experience of gratitude can actually enable us to elevate our typical level of happiness in a sustained way. It takes regular practice to become a healthy habit.

Imagine intentionally focusing on the things in your life for which you are grateful. These might include significant relationships, your own achievements, or the contributions others have made in helping you accomplish your goals, small kindnesses from loved ones or even just the experience of sitting quietly for a while without the intrusion of your phone or Blackberry.

Gratitude increases well-being because it promotes the savoring of positive experiences. When we contemplate our "blessings" we squeeze the most out of these experiences. We stop taking things for granted and notice small things with a sense of wonder and appreciation. Gratitude allows us to get the most from the good things in our lives.

Count Your Blessings

To whom in the past are you grateful? Someone who gave you a break, someone who cared about you, inspired you, believed in you, or someone who simply listened to you? Have you ever sought them out to personally thank them?

For whom are you grateful for in your life right now? Have you let them know lately how much you appreciate them? A simple warm-hearted thank you can make someone's day and lift your spirits.

Gratitude is quite simply an attitude or conscious choice. The one thing we can always choose each day, in any situation, is our attitude. We always have the ability to choose an attitude of gratitude.

One great benefit of a gratitude attitude is you become much more aware of the abundance you already have in your life. Another great benefit of a gratitude attitude is you often attract even more abundance into your life.

Have you ever noticed that what you focus on tends to be what happens? When we focus on our blessings it's much easier to look out for others as well as ourselves.

If you intentionally try to focus on your "blessings" you'll likely notice that it is impossible to simultaneously feel negative emotions. I experienced this during the San Francisco Loma Prieta earthquake when I lost many of my possessions. The acts of kindness of so many people shifted my thinking to appreciation of what truly mattered, and not things that could be replaced. My entire experience of the event was instantly transformed when I focused on those things for which I was eternally thankful.

Gratitude Research
Research demonstrates that people who experience relatively more positive emotions (joy, love, confidence) than negative (anger, fear, anxiety) are more successful and accomplished in various areas of their lives.

They:
- Enjoy more satisfying and longer marriages
- Develop more close friendships
- Build more cooperative, charitable and helpful relationships
- Earn higher income
- Achieve more productivity at work
- Get better work performance evaluations

- Receive better manager ratings
- Engage in richer social interactions
- Express more self-confidence
- Create more resilience
- Demonstrate more creativity
- Experience more energy and "flow"
- Exude better physical health
- Live longer lives

Psychological research indicates that these characteristics are not simply associated with happiness. Experiencing more positive emotion actually leads to this success.

Gratitude Exercises

Many of the people I've coached have experimented with gratitude exercises and found them to have a significant positive impact on their professional and personal lives. Successful people are self-aware and take action.

You might consider using the present moment as an opportunity for such an experiment. Here are seven methods that research indicates can have sustained positive effects:

1. Keep a gratitude journal. Note one to three good things that happened during the day and be specific. Post your intention on Facebook or Twitter. There's even an iPod app for gratitude journaling!
2. Find a "gratitude accountability buddy". Swap gratitude lists with a friend or co-worker; acknowledging where gratitude is due will keep it from sounding like bragging.
3. Watch your language. Using disparaging self-talk reinforces negative thinking. Don't gossip.
4. Practice mindfulness. Several times a day, pause and focus on the sounds, smells, touches around you.
5. Take the time to savor all experiences. Smell the coffee and roses.
6. Count your blessings not sheep when going to sleep. Review events and people to be grateful for and let go of the rest.

7. Go on a gratitude visit. Write and personally deliver a letter of gratitude to someone who has made a positive difference in your life, but whom you never properly thanked.

Creating an attitude of gratitude at home and work can make everyone happier. Even small boosts in positive emotions can make life more fulfilling and satisfying and the world a more peaceful place.

So what are you thankful for? What's good about your life? Be sincerely grateful. What dream do you want to create at home and at work? Trust it is possible and get excited about the possibility. It takes positive energy, a clear vision and massive action.

Thank You for Your Readership!

Are you working in a professional services firm or other organization where executive coaches provide leadership development for senior leaders? Does your organization provide executive coaching to help leaders develop a more sustainable business? Expressing gratitude and appreciation helps enlightened leaders tap into their emotional intelligence and social intelligence skills to fully engage employees.

One of the most powerful questions you can ask yourself is "Do I regularly express gratitude and say thank you?" Emotionally intelligent and socially intelligent organizations provide executive coaching for collaborative leaders who create sustainable businesses.

Working with a seasoned executive coach and leadership consultant trained in emotional intelligence and incorporating assessments such as the Bar-On EQ-I, CPI 260 and Denison Culture Survey can help you create a happy and prosperous business where everyone is fully engaged. You can become a leader who models emotional intelligence and social intelligence, and who inspires people to become fully engaged with the vision, mission and strategy of your company or law firm.

The Career Pivot

Jody Michael

Change is constant, prevalent, inevitable. We experience it in the weather as temperatures vary, in the seasons as spring cycles to winter, and within ourselves as we accumulate experiences. For most of us, these changes or transitions are characteristically familiar. Similarly, we embrace characteristic changes in our careers, expecting a familiar, linear path of advancement within an organization, within the same industry. This typical paradigm describes the traditional career ladder.

However, a paradigm shift has occurred. Change is still constant, prevalent and inevitable, but it is now faster and more pervasive because change is broadening and deepening our ability to connect. The Internet, now a tool rather than a phenomenon, and technology, itself rapidly evolving, enable instant communication. We have global access, so our relationships are expanding and our perspectives of others are broadening.

On this new stage, today's professionals change careers multiple times. These "career pivots" allow people to make agile transitions and follow different, better paths for themselves. Even employers are noticing the advantage of people who can pivot. Reid Hoffman, a cofounder of LinkedIn® who has pivoted often in his career, asserts, "Markets are rapidly changing. Everyone will have to change and adapt. Because markets are changing, companies need help in adapting; this affects how you develop your skill set, which is not a typical 'career ladder.'"[1]

What defines the career pivot and what is its value as a framing strategy in directing your career? How do you manage your achievements so as to translate them into the currency of transferable assets? What are the opportunities and benefits for both the career changer and the new employer? Let's take a look…

What is a pivot?
A pivot is a shift in direction. In sports, such as basketball or martial arts, a pivot takes place with one foot rooted in place as the other foot moves into a different space. The pivot cannot

be executed unless the planted foot provides stability. Think of the anchor foot as your foundation of values, accumulated experiences and achievements, which provides balance and strength as your other foot moves into a new area. Both work in concert to achieve change, as well as stability. When you pivot in your career, you are not throwing away what you have accrued in skills and experiences; rather, these are the underpinnings that help you shift in a new direction.

Why pivot?

Because many motivators drive a shift in direction, this requires that you accept an element of uncertainty in your career. Some professionals are unhappy and need to try something new, some become unemployed, some want to build upon a strength or improve a weakness, and for some, life intervenes or dreams change. Others purposefully apply their own formulas to career changes so that they are constantly evolving. In this last instance, pivots serve as a framing strategy to direct their careers and to refresh how they market themselves. With this approach, you can evaluate your assets and highlight how they benefit the particular needs of a potential new employer.

In addition, career pivots offer:

P   = possibilities

I   = interactions

V   = value

O   = opportunity

T   = transferable assets

S   = satisfaction

Possibilities

The term "pivot" is commonly used in start-up tech companies when they implement revisions or adjust what they do in response to changing market conditions. Rather than stubbornly stick to one idea that might not be successful, a company will pivot to a new idea. As the career changer, a pivot puts you on a new path with a new way of thinking. It often means venturing into something unknown, unfamiliar and uncomfortable. In both cases, a pivot is not starting over; it is using what you have in new ways. A pivot opens you up to new possibilities.

In the music industry, we see many instances of artists shifting to embrace new possibilities. Madonna, Beyoncé, and Lady Gaga change styles and often portray new personalities as they market themselves in fresh, new ways.

Interactions

Other musicians pivot to broaden interactions, inviting novel perspectives and connections. Prominent R & B artist Lionel Richie recently moved outside his genre to collaborate with well-known country stars on his latest album. Innovative partnerships help artists stay current and engage with new fans.

Value

As the examples above illustrate, pivots continually create new value for you and others when you leverage your growing skill sets and accumulated experiences. As you become more comfortable with change, uncertainty, new connections, and your evolving surroundings, you become nimble at addressing shifting market conditions. Nimble athletes are quick and light in movement. Similarly, nimble career pivoters are quick to comprehend and adapt with ease in new situations.

Opportunity

The new circumstances, interactions and challenges encountered during a pivot provide opportunities to increase your awareness of others' perspectives, as well as showcase your flexibility and openness to innovation. In addition, as you effectively face stressors and recover quickly, you demonstrate your resilience as you persist toward your vision. In this way, Reid Hoffman has built upon and transported his experiences to build new opportunities as he has pivoted from social networking to PayPal™ to LinkedIn.

Transferable Assets

Transferable assets are the qualities, experiences and skills that you have accumulated and nurtured in one situation that can easily transfer and apply to a new situation.[2] What you have achieved in one situation now becomes an asset of value in another.

As an example, John Grisham's observations and experiences as a lawyer and a politician have translated into a successful career as a storyteller and novelist. Other examples include the experience of performing multiple tasks simultaneously that develops into a transferable

asset of effective prioritization, or working with many people on a project that cultivates the transferable asset of collaboration.

To determine and communicate your own transferable assets, try the following exercises:

How to Determine Your Transferable Assets[2]

- List five things that make you great at your job.

- Now, one by one, ask yourself, "What makes me good at that?" Try to come up with at least two reasons for each.

- Then, for each of the reasons you listed in the previous step, again, ask yourself, "What makes me good at that?" and you will develop your list of transferable assets.

- Next, do this for your top five to 15 accomplishments.

Re-write Yourself[3]

Once you have determined your transferable assets, look at how these can be applied to another job, career or industry. For potential new employers, translate what you have done into what they are looking for. Captivate them with your story.

- Ask yourself the following questions:

    o What motivated me to make this change?

    o How did I arrive on this particular path?

    o What is the logic behind my choices?

- Consider your audience: As with your resume, tailor and adapt your story to who they are and what they want; give them a reason to care.

- Mine your experiences: Determine your most significant professional and personal achievements and detail how they have shaped your unique path toward the goals that you and your audience share.

- Highlight your trends: Be sure to call attention to the specific decisions you made that allowed you to expand your learning, as well as any positive patterns that have emerged over the course of your career.

- Articulate: Combine these components to tell the story of your career changes in a way that conveys how your choices define your unique abilities and how this particularly benefits your audience.

How to Facilitate a Career Pivot

- Track mobility: How do people move around in an industry as they progress in their careers? What is the point of entry? What barriers are there with regard to education and certification?

- Note landmarks: Who are the big players and the small upstarts? Accumulate facts about the competitors, which can be achieved easily through an online search.

- Locate guides: Find people who know the ropes and workings of the industry and who are willing to share their wisdom and insight (i.e., contextual industry information). LinkedIn and informational interviewing are helpful tools.

Satisfaction

A final advantage of the career pivot strategy is the satisfaction you experience by enjoying a new adventure, thriving on a new challenge, pursuing your passions or resolving feelings of stagnation. Ultimately, the value of a pivot is that you manage your achievements, you direct your career track, and you determine what success and happiness looks like for you. Create your own unique path to attain your goals. What is *your* strategy?

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SECTION THREE

MARKETING OF COACHING SERVICES

Authentic Branding

Suzi Pomerantz

Take a look at creating your Authentic Branding: Whether you've thought about it or not, you already have a brand at work. Meaning how you're thought of and what you're known for. Your image. Even if you haven't intentionally crafted it in alignment with how you want to be known, you still have a brand. We call that your automatic brand. It's the accidental cumulative effect of everything you've done and said and how it's been perceived. Once you become aware of this as a strategic leverage point, you can begin to craft your intended brand. Jot down the answers to these questions and then explore it in conversation with either a coach or mentor, advocate or boss in your organization:

Who do you want to be as a leader (or coach, or business owner, or whatever)?

How do you want to be known?

What do you want others to count on you for?

For what are you the go-to person?

What's your best strength?

What is the best use of you in your organization (or team, business, community, etc.)?

What legacy do you wish to be known for?

Whether your goal is buy-in, leverage, influence, political gain, getting heard, selling your ideas, or just getting noticed and recognized for your contribution, aligning your actions and conversations around your intended brand is how you'll get there. It's about visibility, exposure, navigating the politics, building solid, relevant coalitions. Applies internally and externally.

Once you create your brand, you'll need to manage it by training those around you to see you in this new light, and also to build coalition (strategic relationships of influence) with those who can be your champions and advocates and agents in helping others to see you and know you as you'd like to be seen.

Create your relationship plan for creating strategic relationships of influence. Who are the key players in your industry or organization or community? Who influences the decision makers and how can you create an authentic relationship with them? What matters to them

and how can you support or serve their mission? What is your plan for managing the relationships as well as the perceptions of you as aligned with your intended, authentic brand? Be authentic, be of service, be open to possibilities. Key action: make sure all your messaging, communications, etc. align with your intended, authentic brand.

Authentic Marketing vs. Self Promotion

Paulette Rao, MCC

Many people are turned off by marketing because they see it as self-serving advertising aimed at taking money from people. I've seen loads of this type of shameless, self-promotion out there, and it's a turn off. Of course, you wouldn't want to be known as that type of self-promoter.

The conundrum is that, as an entrepreneur, you have to get your message out there in a big way and, as a coach, you want to live on purpose. You want to grab attention without being pushy, and make sincere promises to deliver that don't violate your integrity. Without applying pressure, you want to inspire clients to take the action you know they need to take. And without using a gimmick, you want to appeal to a sense of urgency. You want to attract the attention of the people who need you and let them know that you're the answer to their prayers. And you need to communicate full-out so that those people can find you! Otherwise, you're a well-kept secret!

So how do you put it out there in a way that feels aligned with your values--where you feel genuine and filled with integrity?

Authentic Marketing

The answer is to market authentically, to learn how to communicate in a clear, sincere, and compelling way. Marketing shouldn't be slinging sales talk at someone or getting on a soapbox. Authentic marketing is having a real conversation that speaks to someone's needs. Its genesis is in uncovering your passion, finding its voice and allowing it to be heard. It's a dialogue that flows from the inside out.

To uncover your passion, you need to reconnect to your vision—why you started your business in the first place. When you do that, you'll clear the mental cobwebs and connect back to what has always been there but got mucked over by those voices that play in your head. Tapes like "I'm not a sales type. I don't have the personality for it." "I don't want to be intrusive." "I don't like to talk about myself." "I'm embarrassed that people might think I need money."

People are attracted when you speak from your passion. When you are in touch with your gift, your energy shifts and a meaningful, natural conversation can open. You speak in ways that illumine opportunities; that make space for transformation. You share your belief in the person's ability to change and invite that person to try on a new way of thinking and being. When your agenda is pure, others are attracted to your clear and obvious commitment to help them create change.

When you re-connect to your love of facilitating positive change for others, your marketing will be transformed because *you* have been transformed from salesperson into instrument of change.

You then become fearless about speaking about the solutions you bring forward. You find this space within you where marketing is no longer a drag. It's exhilarating; in fact, it's feels a lot like falling in love with your gift, again, and enrolling others in *that feeling*. Remember the first day of coach training? How in love you felt with this way of being in the world? What could be more powerful and satisfying?

To market authentically to those we want to serve means that we communicate and show up in ways that respect their sensibilities, speak to their intelligence, and honor their ability to discern for themselves what they will buy.

What does your messaging convey?

Does your heart and purpose shine through your words and way of being?

What will it take for you to shift your marketing messages from promotion to authentic contribution?

Mental Positioning Checklist: Critical Mindsets for Success in Sales

Suzi Pomerantz

Description: Use this checklist to align your mindsets for ultimate success in business development. It's not just about the actions you're taking…you can be taking all the right actions for growing your business, but if you have limiting beliefs or counter-productive mindsets, your results will be less than optimal.

Keywords: mindsets, sales, business development, selling, service, referrals, leads, value proposition

Category: marketing tools

Mental Positioning Checklist: Critical Mindsets for Success in Sales

Use this checklist to align your mindsets for ultimate success in business development. It's not just about the actions you're taking…you can be taking all the right actions for growing your business, but if you have limiting beliefs or counter-productive mindsets, your results will be less than optimal.

- Partnership
- Being a connection-seeker
- Sales is not a dirty word: reframe sales as an extension of your service cycle – it is about helping your clients
- Approach sales from a service context: use your coaching skills in a coach-approach to selling
- Ask "How can I help?" Focus on service, taking care of others, being helpful
- Do what you do -- and think referrals
- Giver's gain
- Six degrees of separation

- Integrity and business ethics
- Keep a broad view of who the client is (strive for depth in organizations)
- Think long-term
- Develop and sustain long term meaningful relationships
- Your sales style and approach must be natural and authentic to you: No tips, gimmicks or techniques will seal the deal for you
- Ask for specific help, referrals, leads, business deals
- Referrals breed referrals
- Expect to grow your business by referrals
- Listen more than you speak
- Provide exceptional service by making bold promises and over-delivering
- Learn what clients need, want, expect and give them more
- Value is defined by the client, not you
- Operate from a foundation of commitment. Articulate what you are committed to and find out what is important to the client
- Act as if the client is already a client and treat them with that level of care through the sales process
- Follow through is critical
- Link individual goals with organizational goals and generate measureable results
- Every interaction is an opportunity for relationship
- Challenge assumptions: yours and theirs
- You are always in a sales conversation…either you're selling or you're being sold to
- You always have a choice
- Adopt an abundance mentality. You can make a difference AND make oodles of money. There are dynamic laws of prosperity. You can read all about them in Catherine Ponder's book, *The Dynamic Laws of Prosperity*.
- Never give away free coaching samples! If you believe people need to have an experience of your service before buying, offer an introductory rate or a discounted sample rate rather than giving it away for free. If you give it away for free you interfere with your own value proposition.

SECTION FOUR

CONCEPTS SUPPORTING PROFESSIONAL COACHING
SERVICES

Avalon and Glastonbury: The Merlin Factor

Charles Smith, Ph.D.

"A high performing human work place calls for equal attention
to Glastonbury and Avalon".

In King Arthur's legend, Glastonbury symbolized a visible city and Avalon an invisible city. Each, however, occupied the same physical territory. Only a few individuals like Merlin, the King's Counsel, knew how to find their way between the two. In fact, most people no longer even knew of Avalon's existence; let alone how to get there.

By analogy, each of today's corporations, government agencies, and communities includes these same two dimensions. In a corporation's visible Glastonbury are found familiar objects and events such as buildings, machines, materials, products, services, vendors, customers, and stock prices. Also there, unfortunately, often reside a host of problems.

In the same companies' invisible Avalon are relational qualities such as mutual trust, honesty, compassionate listening, forgiveness and reconciliation, caring relationships, cooperation toward grand visions, confidence in the future, alignment among personnel, and commitment to others' success. Avalon too, harbors difficulties. Both dimensions have their own cultures and structures, forms of energy, and outputs.

Both Glastonbury and Avalon are essential to the vibrant health, genuine success, and continuous improvement of any organization. Glastonbury deals primarily with objective reality -- things tangible and countable. Avalon is most concerned with relational realities -- neither physical nor easily measurable. Without Glastonbury a corporation cannot offer products and services to its customers. Without Avalon it lacks heart and soul.

Both individuals and organizations move naturally toward higher levels of complexity as they age. At any point in time, too much order, certainty, and predetermined process can suppress energy. So can too much flexibility, looseness, and motion. People need as much

energy as possible to achieve their highest purposes. Typically, however, both people and organizations respond to increased complexity by reflexively increasing order and process. When problems are about relationships, they would be better off tending to Avalon. But Avalon approaches such as becoming more flexible, adaptive, and open are not effective when Glastonbury qualities of order and measuring are called for.

Raising consciousness of both Avalon and Glastonbury may be confusing since people tend to spend their lives seeing the world from one place or the other. As the new category of thought gets clearer, people experience changes and they become more able to operate from a place that recognizes both realities at once.

People tend to think in either/or terms, especially under pressure. In the 'business as usual' universe, people rarely speak the truth from their hearts. They stick to the language of business. While many people are quite willing to talk *about* Avalon, this is deceptive because they are not willing to *go* there experientially. They often need to be led into this unfamiliar territory, and may need to change their usual rules of engagement. In organizations, only a few take on that kind of dual leadership, as most corporate measurement and reward systems place the greatest value on Glastonbury.

Merlin's power comes from the ability to see both sides fully -- to hold opposites in the mind with equal attention. This takes commitment and practice, and is as much about physical realities as about relationships.

Those who operate from Glastonbury, and treat people as things, pay a price in human energy, creativity, innovation and commitment. Those who operate from Avalon, and handle people and things too gently, pay a price in productivity, focus, coordination, and results.

Trust in Glastonbury demands performance and results. Trust in Avalon requires emotional connection and caring. Both are needed in a vibrant and successful enterprise. It's difficult to hold onto the paradoxical reality of a system that honors both realities at the same time.

However, a leader's mind can be open to both realities at once. They can serve both as steward of their organization's Avalon and guardian of their Glastonbury. When successful,

what occurs is a fundamental shift in the corporation's aliveness and effectiveness. If a corporate Camelot could someday become the norm, the same spirit could also extend to the families, communities, governments, and international relations.

The world needs a quantum shift in the way people think. This change need not wait for gradual evolution nor dramatic social or economic crises.

Glastonbury at its best

The optimum Glastonbury is an honorable place where all detail matters. Careful attention to physical detail releases people's physical, emotional, mental, and spiritual energies into great richness and variety. James W. Rouse was founder of the Rouse Company, which became one of the nation's largest publicly held real estate development and management companies. He wrote,

> "*I am committed with the lives of people and communities for generations to come will be affected by what we do; that the surest road to success is to discover the authentic needs of people and do our best to service them; that people seek human places of diversity and charm, full of festival and delight; they are degraded by tacky, tasteless places and oppressed by coldness and indifference; that they are uplifted by the creative caring which that demands; that we believe everything matters; that all detail matters.*" (personal communication, 1995)

In our view, Glastonbury is an organizational metaphor for such integrity.

As Glastonbury stands for the integrity of things measurable in a Corporation, so Avalon stands for the integrity of things non-measurable -- harmony, cooperation, commitment, joy, presence, benevolent authority, freedom, truth, healing, trust, and so on. Creating a unified purpose in a divided kingdom was King Arthur's main job. It is also the job of most corporate leaders. For a corporation to undergo a transformation, leaders need to alter processes fundamental to improving customer focus continually in visible Glastonbury. At the same time, relationships need to expand and improve in unseen Avalon.

Avalon consists of all the genuine relationships within the company as well as relationships with those closely related to it, such as suppliers, distributors, customers. Avalon often fades into the mists unless you are creating and fostering relationships intentionally. Avalon doesn't just happen. As soon as the champions of Avalon go away, so does Avalon. That is

why so much wonderful cultural change management fades when the Avalon leadership changes jobs.

Avalon's energies are all relational, connecting people to each other heart-to-heart. Certain Glastonbury energies are often mistakenly viewed as expressions of Avalon -- smiles, handshakes, hearty greetings, polite conversations, lunches, holding doors open for people, ordering coffee or refreshment, pointing out safety cautions, being on time, showing patience, etc. These don't necessarily require commitment to a relationship nor to the success of another person.

Negative energies happen in Avalon as well. For example, while those who live in Glastonbury can find themselves enmeshed in internal competition, hierarchies of scarcity, and scapegoats, people who live mainly in Avalon can show little concern for results, set unrealistic goals, avoid measurement, and respond with passive aggression to people asking that they perform.

The Merlin Factor is the unblocked present awareness that lets you see that both Avalon and Glastonbury are real, and the intention to act on it.

Evolutionary Change and Organizational Innovation: Implications for Coaches and Their Leader Clients

William Bergquist, Ph.D.

In the field of biology there is a classic (sometimes controversial) mathematical model called the Hardy-Weinberg Equilibrium which provides some rich insight for not only those interested in evolutionary change, but also those who are coaching leaders facing the challenge of introducing innovation and change in their organization. The Hardy-Weinberg Equilibrium model works backwards with regard to evolutionary change—it is about the five key assumptions that lead to NON-change in terms of biological evolution.

The first assumption is that there are no mutations in a population. This would mean that all of the genes that form the basis of all life forms are the same for all members of one species. There is no room, in other words, for variations or mistakes. The second assumption is that any specific population is isolated. Individual members of a specific population (community) can't migrate into or emigrate out of that specific community. The members of any species within a specific community can only breed with individuals from the same community.

The third assumption that would block biological evolution concerns the size of the population. The population has to be very large for the blocking of evolution to occur—leading to the averaging out of differences among members of any one species. If the community is small then any differences will make a big difference (big frog in a small pond), whereas in a large community, differences will be absorbed and not have much of an impact. The fourth Hardy-Weinberg assumption leading to equilibrium is about mating preferences. There will be little evolution if mating is random—anyone from the other gender will do and there is not much discrimination. If members of a species show preferences for those of the opposite sex who are bigger, stronger, prettier, faster, smarter or hairier, then evolution is more likely to occur. The final assumption to be made is closely related to the fourth. It concerns survival and reproduction in a specific population.

Evolution is unlikely to occur if everyone in the community has an equal chance of survival and an equal opportunity, as a surviving adult, to mate and produce offspring.

So, what if anything does this rather theoretical model of evolution have to do with the very real world of organizational innovation and the challenges of fostering change within a complex system (such as exists in 21st Century organizations). I would suggest that all five assumptions can be applied to organizational life. If all or most of the five Hardy-Weinberg assumptions are descriptive of an organization, then it is likely to remain in equilibrium and innovation is unlikely to occur. The key, therefore, for the organizational coach and leader client is to ensure that these assumptions aren't being met. Let's focus briefly on each assumption and see what it says about organizational innovation and change. Furthermore, what applications can be made to the work being done by an organizational coach?

Mutations and Organizational Diversity

If there are no mutations in a population then evolution will not take place. There is no room for variations or mistakes in a system in equilibrium.

Implications

Innovation requires that things are not always going right in an organization. There must be variations if the organization is to generate innovations. As noted by Stephen Greenblatt in his Pulitzer Prize-winning book, *The Swerve*, the critical role played by mutations and mistakes goes back many centuries to the writing of Lucretius in *The Nature of Things*. As interpreted by Greenblatt (2011, p. 188), Lucretius is proposing that:

> Everything comes into being as a result of a swerve. If all the individual particles, in their infinite numbers, fell through the void in straight lines, pulled down by their own weight like raindrops, nothing would ever exist. But the particles do not move lockstep in a preordained single direction. Instead, 'at absolutely unpredictable times and places they deflect slightly from their straight course, to a degree that could be described as no more than a shift of movement.'

In contemporary times, Scott Page (2011) writes about the generation of multiple ideas (mutations) and the power of diversity within any system in his very challenging book, *Diversity and Complexity*. Page suggests that a world filled with many perspectives is one in which good ideas, clear thinking and accurate information is likely to emerge: "if we have lots of diverse paths . . . , we are not likely to make mistakes. If we only have a few paths,

mistakes are likely. "(Page, 2011, p. 240) Page makes the strong case for the important interplay between complexity and diversity. Systems that are complex and diverse will be more resilient and amenable to change:

> Systems that produce complexity consist of diverse rule-following entities whose behaviors are interdependent. . . . I find it helpful to think of complex systems as "large" in Walt Whitman's sense of containing contradictions. They tend to be robust and at the same time capable of producing large events. They can attain equilibria, both fixed points and simple patterns, as well as produce long random sequences. (Page, 2011, pg. 17)

There is one thing we have learned in recent years with regard to the viability of organizations that has almost become an axiom: if there is extensive variability (disturbance) within the environment in which an organization operates, then there must also be extensive variability (diversity) inside the organization. Page identifies this axiom as the *Law of Requisite Variety*:

> . . . the greater the diversity of possible responses, the more disturbances a system can absorb. For each type of disturbance, the system must contain some counteracting response. . . . The law of requisite variety provides an insight into well-functioning complex systems. The diversity of potential responses must be sufficient to handle the diversity of disturbances. If disturbances become more diverse, then so must the possible responses. If not the system won't hold together. (Page, 2011, p. 204, 211)

Applications

In order to promote organizational innovation, a coach must encourage her leader client to value diversity within the organization. However, the coach should also help her client to recognize that diversity requires the client (and other members of the organization) to tolerate increased ambiguity, effectively manage conflict, and provide safe settings in which alternative ideas can be explored. Therefore, the coach should help her client identify strategies (training, setting of norms, creating supportive settings) that enable her client and other members of the organization live with ambiguity, work with conflict and provide safe places for idea exploration.

Migration and Open Boundaries

Evolution will not take place if a specific population is isolated. If individual members can't migrate into or emigrate out of that specific community then evolution is likely to be stymied.

Implications

Organizational theorists and change agents have often emphasized the difference between open and closed systems. Organizations are systems that can be differentiated in this manner: some have relatively open boundaries and others have relatively closed boundaries. Closed systems and organizations with impermeable boundaries are likely to be stable and secure over the short term, but are also likely to soon die because of a lack of replenishing resources from outside the system and because of an inability to respond effectively to the impingement of outside (environmental) forces.

Cross-pollination of ideas in a cross-cultural context occurs in open-boundary organizations and is critical to innovation, sustained success and even organizational survival. At the individual level, we are talking about those men and women who are cosmopolitan in their perspectives as compared to those who are parochial in their perspectives on life and the world. The cosmopolitans create and live in a world of open boundaries. These are the early adopters in the diffusion of innovations. (Rogers , 2003)

We see the increasing viability of open boundary systems in the flat world made famous by Thomas Friedman (2007). Clearly with the Internet and globalization of many markets, there is the need for more open boundaries. However, as I mentioned in *The Postmodern Organization* (Bergquist, 1993), the challenge of open boundaries is the need for some "glue" that holds the organization together. This glue can be found in the clear and compelling mission, vision, values and social purposes of the organization, in the strong and enduring culture of the organization, or (sadly) in the absolute control exerted by a central leader or C-Suite coalition of leaders.

The flat world of Thomas Friedman is filled with many additional challenges--including the emergence of *Power Law* dynamics in the Internet-based markets of our 21st Century world. In many instances, the market for specific products or services has expanded at an

exponential rate (the Power Law in operation)—or collapsed at an exponential rate (also exemplifying the Power Law). As Taleb (2010) has noted in *The Black Swan*, a few products (books, technologies, etc.) and a few websites tend to account for most of the sales and traffic on the Internet. Furthermore, the tides created by these sales and Internet traffic tend to ebb and flow quickly and in unanticipated ways.

Thus we find that temporary dominance and centralization will distort the open boundaries described by Friedman. The Power Law calls for new perspectives regarding the migration of ideas, people, products and services in our 21st Century world. We find the promise of diffusion and equity via the Flat World tempered by the challenge of temporary (or long-term) dominance and centralization in the global marketplace.

Applications

In order to promote organizational innovation, the coach should encourage her leader client to focus on the creation, identification, clarification and/or institutional-embedding of mission, vision, values and social purposes. A coach should also encourage and guide her client in the appreciation, honoring, strengthening and use of the existing culture within their organization, recognizing its value as a source of stability and coherence in their organization. Furthermore, the coach should encourage her client to gain a cosmopolitan perspective (learning about and visiting other organizations and geographic regions), as well as encouraging her client to find ways for other members of their organization (especially mid-managers) to gain this cosmopolitan perspective. The coach should also help her client recognize the need for contingency planning in their organization in response to the rapid, complex, and unpredictable Power Law changes that can occur in the marketplace and environment in which their organization operates.

Size and Deviant Impact

If the population of a specific species is very large then evolution is unlikely to occur, for in a large population there is an averaging out of differences among members of any one species. If the community is small then, according to Hardy-Weinberg, any differences will make a big difference.

Implications

Very big organizations tend to swallow innovations. Rosabeth Kanter (1990) wrote about this many years ago when she described the challenge of teaching giants (big organizations) to dance. She noted that there is a pervasive tendency for large organizations to be preservation-seeking bureaucracies. Unfortunately, this tendency is counterproductive in our volatile 21st Century world. As Kanter prophetically noted, large organizations must become more entrepreneurial and less bureaucratic if they are to survive. They must become focused, fast, friendly and flexible. These organizations, in other words, need to be able to dance—and this seems to be ironically appropriate, given that they must survive in what Scott Page (Miller and Page, 2007; Page, 2011) describes as the *Dancing Landscapes* in which many of these organizations now operate.

The preservation-seeking bureaucracies described by Kanter seem to evolve from several fundamental principles regarding the size of systems. We have known for many years that an increasingly large proportion of a system's resources (people, money, energy, conversation) goes into the maintenance functions of this system, as it grows larger (and as it grows older). As I noted in *The Postmodern Organization* (Bergquist, 1993), this general principle regarding systems can be specifically applied to organizations. A small organization will tend to devote a large percentage of its resources to the generation of specific products or services—whether it is producing chairs or offering hospitality services.

A large organization, by contrast, will often devote as much as 90% of its resources not to production or provision of services, but to the overall maintenance of the organization (management, communications, coordination, etc.). As an organization grows larger (and older) it takes much more time, attention and people to hold the organization together—especially if the organization operates within a hierarchical structure rather than allowing self-organizing dynamics to prevail (an idea first promoted by Ilya Prigogine and later described in greater detail by many chaos and complexity theorists and researchers, such as Scott Page and Steven Strogatz, and made accessible by Margaret Wheatley in *Leadership and the New Science*) (Prigogine, 1984; Strogatz, 2003; Wheatley, 2006; Page, 2011)

Applications

In order to promote organizational innovation, a coach should encourage and guide her leader client in the management of growth and size within their organization (recognizing that most organizational problems can't be solved simply by growing larger). She should also encourage her client to consider growth not in the size of their organization, but in the number and diversity of cooperative and strategically collaborative agreements they have with other organizations. (Bergquist, Betwee and Meuel, 1995; Kanter, 1997, Chapter 20)

Preferences and Distinctive Contributions

There will be little evolution if mating within a specific species is random. If members of a species show preferences for specific characteristics in those of the opposite sex, then evolution is more likely to occur.

Implications

Life in an innovative organization isn't fair. Some people seem to be doing a better job and are coming up with more ideas than other people. In his assessment of diversity and complexity, Scott Page proposes that: "systems need competition to flourish and diversity increases competition." (Page, 2011, p. 217) "Absent competition" concludes Page, "entities—be they firms, species, political parties, or ideas –may lack pressure to improve or respond to changes on the landscape. . . .[D]iversity provides the seeds for innovation and thus . . . pulls toward more pressure." (Page, 2011, p. 216) This emphasis on competition and preference for the fittest certainly doesn't appeal to our sense of fair play and may even contradict the societal values of democracy. However, it might be critical to the promotion of innovation and organizational change.

What is the distinctive contribution to be made by each member of the organization and by each functioning unit of the organization? How do we take full advantage of the distinctive strengths of each member and unit – while also recognizing that these distinctive strengths can get the member, unit (and overall organization) in trouble if overused or used inappropriately. The answer to these questions in part resides in the analysis of the fifth assumption in the Hardy-Weinberg Model—with specific emphasis being placed on an organizational culture of appreciation (Srivasta, Cooperrider and Associates, 1990; Bergquist, 2003; Cooperrider and Whitney, 2005; Bushe, 2010).

Applications

In order to promote organizational innovation, a coach should guide her leader client in the identification of leverage points (internal strengths) within their organization and strategic advantages (external opportunities) they hold with regard to other organizations in their same market. The coach should also help her client identify the individual strengths they hold in the organization, as well as ways in which these strengths may be over-used or used in an inappropriate manner by themselves.

Survival and Appreciation

Evolution is unlikely to occur if everyone within a species has an equal chance of survival and an equal opportunity, as a surviving adult, to mate and produce offspring.

Implications

Organizations foster innovation when they are truly being challenged to do it right in order to survive. There is a critical decision-point in the life of any organization and any leader of an organization. When faced with a major life-threatening challenge, the choice is to either freeze and hope the challenge will go away, or seek out new solutions—and perhaps even more importantly seek out actions that have already been engaged in the organization when faced with a similar challenge in the past. This doesn't mean returning to old solutions. As Scharmer (2009, p. 7) has proposed in *Theory U*, we must be able to "learn from the future as it emerges".

Scharmer notes that: "leaders cannot meet their existing challenges by operating only on the basis of past experiences . . . . Sometimes you work with teams in which the experiences of the past are actually the biggest problem with and obstacle to coming up with a creative response to the challenge at hand." (Scharmer, 2009, p. 8) How do we learn, as Sharmer writes, "to better sense and connect with a future possibility that is seeking to emerge?" I would apply to organizational life the biological theorists' proposition that evolutionary change requires selective survival: the surviving organization in the 21st Century is likely to be one that can learn into the future.

How do we learn into the future? It doesn't mean we abandon the past, but it does mean that we are selective about what we take from the past and are required to always test this

acquisition from the past against emerging challenges and realities. We need to catch people when they are doing it right in response to the new realities and need to reinforce this successful behavior. Members of an organization will often do it wrong in a world that is changing rapidly and in unpredictable ways. However we can learn not just from our mistakes but also from our successes. We create a learning organization when we can appreciate (and learn from) the times when our organization gets it right.

This is the key point to be made by Hardy-Weinberg: not every idea is equally good, so we must reinforce the good ideas. We must not just celebrate our successes, we must also spend time reflecting on the lessons to be learned from these successes, knowing full well that these lessons will not fully match with future challenges (learning forward). This appreciation provides courage and persistence, as well as partial answers to the new challenges.

Applications

In order to promote organizational innovation, a coach should encourage her leader client to create and maintain a learning organization that is geared not only to learning from its mistakes but also to learning from its successes. The coach should encourage and guide her leader as he learns into the future through embracing successes rather than just seeking to avoid failures.

Concluding Comments

There are many applications that can be extracted from the Hardy-Weinberg Model. I have hopefully identified a few of those which are of greatest relevance to the reader of this essay. Innovation and organizational change are not easy to implement and guide in the complex, unpredictable and turbulent environment in which contemporary leaders must operate. We need to look to many sources of wisdom and insight when helping our leader clients formulate strategies to respond to the challenges of this dancing environment. I believe that the Hardy-Weinberg Model is one of these sources.

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The Social and Cultural Characteristics of Generational Age Groups

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Any study regarding the challenge of coaching men and women from all age ranges must take into account social and cultural aspects of age groups that broadly define who these people are and what they represent. One way of doing this is to identify age-related characteristics that are reflected in literature on the nation's four existing generations. But in reviewing major findings there are a number of cautions, the first being that these generational groupings are based on a single criterion: age. Second, demographic profiling makes generalizations about *groups* of people, and individuals do not necessarily conform. Third, demographic generalizations are simplifications of reality and must be used with care in reaching conclusions about specific age groups (Endnote 1). And fourth, demographic researches often use different age ranges for each of the four generational groupings. So in reviewing characteristics of the four age cohorts, our purpose is to present *generational flavor*.

This is the first time in American history that four generations occupy the same life space. There are the *Traditionalists* (born before 1945), *Baby Boomers* (born between 1946 and 1964), *GenXers* (born between 1965 and 1980), and *Millennials*, or *Generation Y* (born between 1981 and 2000). The cohorts of each generational grouping have their own general characteristics, including significant events that have shaped their lives. They also have different views on work, leadership, communication, political and consumer values, and civic engagement. Much of what follows is taken from the original sources that are identified in the endnotes.

Traditionalists

Now at least 65, this cohort actually consists of two age groups: Veterans (born 1901-1924) and the Silent Generation (born 1925-1944). It is *the second smallest number in the US population* (55 million) (Endnote 2). Traditionalists of both groups share many of the same characteristics. They either entered the workforce before World War II, or came home from

the war and got a job, or were born during this period. Many of their behaviors today can be traced to experiences during or immediately after the Great Depression, World War II, the atom bomb, the GI Bill, and the Korean War.

Traditionalists grew-up when children were "to be seen and not heard." The assault on America's political liberty by the House Committee on Un-American Activities in tandem with Senator Joseph McCarthy's inquisitions *mortified them for life*. McCarthy whipped up anti-communist sentiment to such a degree that it was dangerous to express an opinion anywhere, about anything. People went to jail for beliefs and affiliations held 20 or 30 years earlier. Free speech was all but dead. People became apolitical. Safe. Silent (Endnote 3)

No generation has been so misunderstood and underestimated. **T**he majority of Traditionalists still alive, are about 95% retired and often are worst off financially now than they were previously in their life. In a few short years they have come to command no industry, battlefield, or any other organization of significance. In terms of formal leadership and public visibility, they will have mostly disappeared into the shadows. Yet, this has been a generation of helpers. It produced every great Civil Rights leader, almost every leader in the Women's Movement, and most of the scientific and industrial giants. Its greatest contribution has been to humanize their world, and now they want to ensure a safe world for their grandchildren (Endnote 4).

Traditionalists play by the rules. Their principal values are trust, privacy, conformity, faith in institutions, respect for authority, patience, responsibility before pleasure, self-denial, formality, and social order. They may not be as hardy as they used to be, but they are tough and resilient. They didn't make it through the Dust Bowl, the Great Depression, World War II and Korea by dwelling on negatives. They remember a time when people treated one another with common courtesy and when morals and ethics defined the character of an individual (Endnote 5).

The leadership style of Traditionalists has been to "be in command and have control," a style mostly lacking in today's technological era. They tend to prefer formal communication through memos rather than e-mails, possess good interpersonal skills, believe that promotions, raises, and recognition should come from job tenure, and measure work ethic on the basis of timeliness and productivity (Endnote 6). Today in retirement Traditionalists

want flextime arrangements, so if they continue working or volunteering it is on their own schedule and terms.

Overall, Traditionalists tend to be social and fiscal conservatives and are mostly Republican. They prefer the status quo, distrust change, and are slow to embrace it. They have saved money and consider retirement and leisure time suitable rewards for sacrifices made earlier in their lives (Endnote 7). Yet they also see themselves as vital and active people in the prime of life, about 15 years younger than their chronological age. Traditionalists have pioneered the way Americans view aging today.

Although most Traditionalists worry that they will leave the world in worse condition than they found it, they set the pace for civic action decades ago and are continuing to do so through volunteering today (Endnote 8). The trajectory for older adult volunteering has been upward through the last three decades, and Traditionalists are the most likely group to serve 100 or more hours a year.

Baby Boomers

Now between ages 48 and 66**,** this generation is *the second largest in the US population* (78 million) *and also the most influential* (Endnote 9). Unlike their Traditionalist parents, Baby Boomers didn't experience economic or social hardships and have been able to focus mostly on themselves. They were born to post-WWII prosperity, when the economy expanded rapidly. Boomers have enjoyed unprecedented opportunities in education and employment and are the first generation who genuinely expected the world to improve with time. They also grew-up when momentous social conflict and change were occurring: the assassinations of JFK, Robert Kennedy, Martin Luther King, and Malcolm X; Vietnam; war protests and riots; Woodstock; the walk on the moon; Beatle mania; and the civil rights, women's, and environmental movements (Endnote 10).

Having parents who dedicated their lives to giving their children more than they got, Boomers have been characterized as a "spoiled" and "feel good" generation of the 20th Century. They also have been characterized as self-absorbed seekers of instant gratification, uncomfortable with personal conflict, and overly sensitive to feedback. But Boomers also are more tolerant than other generations and feel money will always be available for everyone.

Sharing an expectation of prosperity and affluence, Boomers easily embrace social programs (Endnote 11).

Boomers have brought productivity to the forefront of their communities and workplaces and are firmly in control—which is now beginning to change, with the oldest of them starting to retire. They run local, state, and national governments, are the bosses, supervisors, managers, and CEOs of most companies, and dominate the workforce. In these roles Boomers are optimistic, thrive on change, and are willing to go the extra mile. They possess an intense work ethic and measure it by hours at the job (true workaholics, their vacation IS work). They also are competitive by nature and expect loyalty from those with whom they work. Yet they believe teamwork and a collegial leadership style are critical to success, and they feel relationship-building is key (Endnote 12).

Boomers first came to political awareness during the cultural turmoil and failed presidencies of the late 1960s and 1970s. They are fairly evenly divided in their party and ideological identifications, reflecting a gender gap between strongly Democratic women and conservative Republican men. Many of these men and women claim allegiance to neither party. They often either have no party affiliations (and have grown politically apathetic) or they are members of the Purple Nation who tend to be blue (left) on social issues and red (right wing) on economic issues (especially those issues pertaining to taxes and government spending). Many of these Purple Nation Boomers take a moralistic and value-oriented approach to politics. They are highly concerned with almost all issues, but especially the economy, healthcare, changes in societal values, and the Middle Eastern wars; they tend to hold strong and relatively extreme positions on most issues (Endnote 13).

Boomers are also the shocked generation. This may account for many of those who are now politically disengaged. Throughout the past decade they have seen their ingrained sense of entitlement jolted by unmet expectations. For many of them high-paying jobs, large houses, and multiple cars evaporated with the careers and lifestyles that were severely impacted by massive layoffs in the late 80s and early 90s. And now they are experiencing the worst recession since the Great Depression (Endnote 14). Boomers were once in their peak earning years, but they have been better at spending money than at saving it. They now face retirement and worry about their future Social Security benefits and Medicare entitlements (Endnote 15).

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Even though stressed about financial concerns, Boomers anticipate a busy retirement lifestyle, and many plan to make time for volunteer activities and paid *encore careers* (second careers having social purpose). They seek volunteer opportunities *if* these fit their specific interests, skills, resources, and abilities. They volunteer *if* they can make a meaningful contribution in a *limited amount of time*. They are not satisfied with fulfilling a role based solely on the needs of an organization. In short, Boomers anticipate doing what they *want* to do, not what they *have* to do (Endnote 16).

Generation X

Now between ages 32 and 47, the Xers are *the smallest age cohort in the US population* (45 million) (Endnote 17). These children of Baby Boomers were born after the introduction of birth control and when women began sharing the breadwinner role with men. Xers grew-up during a period of financial, familial, and societal insecurity and tumultuous change. Significant life shapers included the end of the Vietnam War; the Iranian hostage crisis; the presidencies of Ronald Reagan and George H. W. Bush; the Watergate and Iran-Contra scandals; the Clinton-Lewinsky debacle; Three Mile Island; Bhopal; AIDS; the fall of the Berlin wall and end of the cold war; Desert Storm; the 1987 stock market crash; a stagnant job market, corporate down-sizing, and limited wage mobility; and the inception of the home computer, video games, the Internet, MTV, and the rise of Dot-com businesses. Also critical in shaping Xers was their parents having suffered devastating job losses, which made them wary and pessimistic about their own future. They are the first generation predicted to earn less than their parents (Endnote 18).

Gen Xers spent less time with their parents than previous generations. The first to be recognized as "latchkey kids," Xers found themselves home alone taking care of themselves and their siblings while their parents worked. They were not coddled for every emotional need and want, and divorce was common. Also, single-parent and blended families helped this generation to understand diversity and appreciate that families come in all shapes and sizes. Rather than respect for authority, the natural byproducts of the Generation X childhood have been autonomy, adaptability, and self-reliance (Endnote 19). Given their childhood experiences, Xers have a very different view of what is important than their workaholic Boomer parents. They enter the workplace with an expectation that balance in life is essential.

If work becomes too overwhelming, it's not surprising to see Gen Xers leave and redirect their lives to a better match for their priorities and values. This isn't to say that Gen Xers can't be hard workers. It means they are driven by projects in which they are genuinely invested and don't respond well to micromanagement. Xers are comfortable with authority but are not impressed with titles. Their leadership style is to ask "Why?" They treat everyone the same and challenge others when needed. Their communication style is sometimes taken as rude or impersonal because of its directness (Endnote 20). Xers' most sought-after values are autonomy, freedom, and meaningful work. Above all, they value an entrepreneurial spirit.

Having grown-up with double-digit inflation and seen parents lose jobs, members of Generation X tend to be economically conservative (Endnote 21). This translates to politics as well. They came of age during a time in which conservative ideas were ascendant and Ronald Reagan was president. They continue to support the Republican Party and conservative ideology more than any other generation. Xers broadly favor a libertarian position on social issues and tend toward strict punishment as the best means of handling crime. And they supported the invasion of Iraq (Endnote 22).

While Xers aren't fixated on retirement needs, they have been smarter than their Boomer parents were about financial planning. They have saved more money than previous generations and have taken advantage of 401 (k) accounts, beginning this investment much earlier in their work life. And they have not waited to put money aside for their children (Endnote 23). Yet Xers are also saddled with significant financial debt. Some of this debt stems from educational loans, but even more is attributed to expensive lifestyle choices. Some 20 percent of Xers are depressed over financial obligations stemming from their lifestyle, and 33 percent are so deeply in debt they will probably never get out (Endnote 24).

Generation X became a hot topic in the nonprofit world when a study found that people born from 1965 to 1980 gave substantially fewer dollars to charity than donors from earlier generations (53% of Xer households donated $25 or more, compared with 75% of Baby Boomers) (Endnote 25). But this is only part of the story. Xers consider donating time and talent to be just as important as providing financial support. They focus their philanthropy in doing small individual acts of kindness without caring if anybody applauds or notices. This type of giving suggests that Xers have a clear perception of how their own contributions make a difference (Endnote 26).

Millennials (Generation Y)

Now age ages 12 to 31, Millennials (also called Generation Y) mostly are children of Baby Boomers but also of Gen Xers. *They are the largest generation in US history* (80 million) (Endnote 27). Having watched their parents and grandparents grapple with change, Millennials are growing up in a world that is constantly revising and restructuring itself. To them change is normal. The forces that have shaped them include the fall of the Soviet Union, the first Gulf War, the Columbine Shooting, the Oklahoma City Bombing, September 11, corporate scandals, and the advent of the Internet and many other technological advances. Through it all Millennials are developing an amazing optimism and conviction that the future will be better for everyone—a refreshing alternative to their pessimistic and materialistic Gen Xer predecessors (Endnote 28). Currently the most educated generation in the US, they are confident of their future and consider continuing education and life-long learning mandatory.

Millennials were raised by Baby Boomers and Gen Xers who tried to be highly involved parents and do everything for their children. This resulted in a generation used to a heavily scheduled and pressured life. Their parents shuttling them from ballet to soccer to flute lessons resulted in the creation of the minivan and the idea of "soccer moms." Shunning competition and the need for winners and losers in life, Boomers and Xers lobbied for something less judgmental for their Millennial children; they crusaded for the elimination of honor rolls at school and added awards for many types of accomplishments. That's why Millennials are sometimes called the "Trophy Generation," or "Trophy Kids," terms that reflect the trend in competitive sports and many other aspects of life where "no one loses" and everyone gets a "Thanks for Participating" trophy (Endnote 29).

Millennials feel their greatest advantage is being born into a technological society. They are the experts in social media and know how they work. Having had the Internet most of their lives, they are used to possessing knowledge at their fingertips at all times. Especially are they skilled at multitasking, and they can balance a mobile data terminal and a 12-lead electronic patient care device and still hold a conversation (Endnote 30).

Many employers consider Millennials the hottest workers since WW II's Rosie the Riveter. They're sociable, optimistic, realistic, talented, team-oriented, open-minded, tenacious, influential, technically savvy, and achievement-oriented. Because Millennials grew up with heavily scheduled lives, they are well-suited to such work environments. In the workplace

they want a job that provides great personal fulfillment. They also look for employers who can help them to achieve their goals, and they want open and constant communication and positive reinforcement from their boss. Guidance is important in helping them to manage their time effectively, and to avoid getting overly stressed (a remnant of their childhood) (Endnote 31).

Millennials started their political awareness during the Clinton years. They are evenly dispersed across the political spectrum, believe no political party has all the answers, and flocked to Obama during the last presidential election. They are more likely than any other generation to hold liberal or progressive opinions across all economic, environmental, security, crime, education, and social issues. And they tend to have relatively positive and optimistic perceptions about the political process and their economic futures (Endnote 32).

Community service seems to be embedded in Millennials' DNA; it's part of their generation to care about something larger than themselves. Rather than "keeping up with the Joneses," they want to help others. Surveys show that people born between 1982 and 2000 are the most civic-minded since the generation of the 1930s and 1940s. Unlike culturally polarized Baby Boomers or cynical Gen-Xers, this is a generation of activist doers (Endnote 33). Indeed, in the 2009 Civic Health Index Millennials emerged as the "top" group for volunteering. They led the way in volunteering with a 43% service rate, compared to 35% for Baby Boomers (Endnote 34).

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Positivity (Happiness) in the Workplace and Organizational Change

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In 1987 I joined a large banking group in South Africa as the Customer Communications and Training manager of their new electronic banking division. I knew I was in trouble when during the first week on the job I was told of a photo shoot with the then CEO. Apparently as the photographer was about to take the photograph and said "smile", the CEO stood up with a serious face and said, *"Young man, banking is a serious business, we do not smile around here".* Whether this story was true or not is unimportant. What is important that it was told and re-told many times and ultimately became part of the culture of the company. The corporate culture was harsh and militaristic, indeed a number of senior executives were former military officers. Some months into my new role, I was asked to do a presentation to a group of senior managers. After my presentation, one of the members of the audience approached me and pulled me aside. He said, *"I know you are new here, so I'd like to offer some advice, and that is to remove the emotional words from your vocabulary. Emotional language does not go down well in this organization".* He was certainly correct – the organization was perhaps the most emotionally barren organization I have ever worked with. There were pockets of passion and energy—however these were exceptions and primarily the result of initiatives taken by specific individuals (including my immediate boss, a remarkable individual who was the only reason I continued to work in that environment).

My first exposure to large-scale organizational change came from a brief dialogue with Denzil Busse, [then Managing Director of Standard Bank of South Africa (SBSA), and a personal mentor to me]. Denzil was responsible for the retail bank and had been very concerned with the lack of improvement despite several efforts to improve. Along with the poorest service levels of any major bank, SBSA was also losing market share. But it was no wonder to me that this organization had the poorest customer satisfaction scores of all the major banking groups – great customer service requires passion and a high degree of positive energy and interest in people. "Smiling" and "emotional language" are basic requirements. Denzil had called me to his office to discuss this dilemma, and I expressed my concerns to him. Instead of the emotionally stunted response I had

received from other executives, Denzil listened intently. What ensued was one of the largest change strategies I have been involved with. Under the leadership of this remarkable individual, Denzil and I jointly, along with the efforts of many others in the Retail Bank, developed and implemented a process that engaged 22,000 employees in improving business processes and work culture. Eventually SBSA went from being the worst performing bank in customer service and losing market share to the best customer service and improving market share over a six year period. This organizational change could not have been achieved without the positive work environment and energy that Denzil Busse created for this immense effort from these many thousands of employees. A remarkable achievement and a big win for positivity in the workplace.

Positivity in the Workplace

Throughout my career, indeed my life, I have been struck by the observation that most work environments tend towards the negative rather than the positive, and are sometimes even punitive. From my early years, observing my father being unhappy at work to my thirteen years in the banking industry and more than a decade consulting in companies such as Chevron, Wells Fargo Bank, Levi Strauss and Pacific Gas & Electric, my experience has been consistent – most working environments tend to focus on the negative, and are even punitive and abusive in some extreme cases. My experience with positive work environments suggests that these were always was due to a specific manager or leader, who despite the milieu, created energy, positivity and happiness in his or her scope of influence. Even my 12 months of military service in the South African Air Force demonstrated this fact - where there is a positive work environment, people are happier and they flourish and excel, and where there is a negative work environment, people are unhappy and they flounder and under perform.

In his book *The Happiness Advantage*, Shawn Achor (2010, p. 21) cites meta-research of over 200 scientific studies on nearly 275,000 people. He comments …

(The research) found that happiness leads to success in nearly every domain of our lives, including marriage, health, friendship, community involvement creativity and in particular our jobs, careers and businesses"

Achor goes on to note that happy CEOs (unlike the banking CEO described above), are more likely to lead teams of employees who are both happy and healthy, and who find their work climate conducive to high performance.

Clearly being happy at work is not only important from a "feel good" perspective. It is a driver of personal and work success. If this is so, then why is it that so many are not happy in their work and their companies and why is it that so few companies focus on developing a positive work environment? Indeed, according to The Conference Board, only 45 percent of Americans said they were satisfied with their jobs. This is a huge drop from the more than 61 percent who said they were satisfied in 1987, the first year the survey was conducted

What is Positivity and Happiness?
Archor's definition of happiness (2010, p. 39), for me personally, strikes a balance between the notion of happiness being an emotion of simply feeling good and a more constructive and meaningful version:

… the experience of positive emotions – pleasure combined with deeper feelings of meaning and purpose. Happiness implies a positive mood in the present and a positive outlook for the future… For me, happiness is the joy we feel striving after our potential"

I would imagine that the banking CEO I referred to in the Introduction to this paper would have been more supportive of Archor's definition of happiness than what appeared to be his mental image that required no smiling!

Happiness as a general construct has also been described as Subjective Well Being (SWB), a term coined by Ed Diener (2008). Diener described SWB as having three elements, namely life satisfaction, positive affect, and negative affect. The implication being that an individual with high life satisfaction, high positive affect, and low negative affect has high SWB. The scientific term "Subjective Well Being" or SWB is used to avoid the ambiguous meaning of the term happiness.

Fredrickson (2009, p.6) prefers the use of the term "*positivity*" versus "*happiness*" because she considers happiness too vague and overused for scientific purposes. She describes

positivity (2009, p. 6) as "*a range of positive emotions – from appreciation to love, from amusement to joy, from hope to gratitude and then some*". Fredrickson further comments that the term positivity is purposefully broad, including the long term impact that positive emotions have on ones character, relationships, communities and environment. She describes ten emotions that make up her definition of positivity, namely joy, gratitude, serenity, interest, hope, pride, amusement, inspiration, awe and love. These are scientific terms, she says, that can be defined and measured with precision. The importance of measurement in this case is that Fredrickson and her colleagues have identified a key ratio of at least 3-to-1 positive emotions to negative as being the tipping point that predicts whether people spiral into negativity or flourish. While other emotions obviously exist, scientific research suggests that these ten are the major ones that form the foundation of positivity. Fredrickson further describes a range of tools and techniques that can be used in ones daily life to enhance positivity.

Clearly, as implied by these definitions, happiness, positivity or subjective well-being cannot be attained through a permanently easy life, lacking struggle and challenge. The notion of striving towards life and career goals implies that a sense of well being requires some level of striving or struggle. However, success can also not come from punitive and harsh struggle. We need to reframe our notion and description of happiness in the workplace in order to apply the techniques and principles that foster and nurture happiness and use it to enhance the success of the organizations we work with.

The Happiness "Challenge"

I titled this section of the essay "*The Happiness Challenge*" because happiness – or positivity – does not manifest easily, particularly in the workplace – certainly not without effort for most of us and it is particularly challenging in most work environments where deadlines, budgets and performance issues can compromise most people's sense of happiness. Indeed, as Frederickson describes (2009, p. 28), in the United States, despite "*The Pursuit of Happiness*" being guaranteed in the Declaration of Independence, the US was rather forged under the influence of a harsh Protestant work ethic; a philosophy that holds that enjoyment, pleasure and leisure are bad and that people can only show their worth through hard work and toil; Happiness and fun should be shunned in favor of long, hard work hours and deprivation.

Without doubt, this ethic was alive and well in the banking group example I described at the beginning of this paper. The US and many other societies have entrenched harshness in the very essence of who we are as a working nation. It's not surprising that even using the term "happiness" in the workplace, as I have personally experienced, can elicit dismissive eye-rolling and even a degree of contempt. As I describe in more detail later in this paper, the change management consulting methodology known as "*Appreciative Inquiry*", in my experience, faces challenges simply based on its title ("*Appreciative*") and its focus (the positive). It is common, I find, that business leaders focus on "*problems*" as their default lens of attention. Seeking out the positive and appreciating what is good in an organization is dismissed or ignored as irrelevant or even worse, a diversion from what is important and urgent.

The focus on negativity in the workplace can create a culture of anxiety, fear and distrust over time. How often do we experience co-workers arriving at work with full-blown flu or other illnesses because they feel guilty about staying at home, and half-joking comments about co-workers who arrive at work late or leave work early with the implication that they are lazy? Or colleagues who have difficulty taking vacations out of fear that they may fall behind at work. A former boss of mine frequently described how he had never fully completed a planned vacation because he felt compelled to get back to work – this is an individual who had a minor stroke in the office next to mine at the age of 42, and is a perfect example of what Achor (2010, p. 73) calls the "*Workaholic's curse*". Despite writing this paper in what is almost 2012, the workplace is still an environment more commonly characterized by harshness and negativity rather than positivity and upliftment. Indeed, as Fredrickson (2009, p. 28) comments, happiness in the workplace may even be considered "*Un-American*":

"The United States - and much of the capitalist world – was forged under the influence of the Protestant work ethic, a philosophy that holds that enjoyment and leisure are sinful, and that only through austere work activities can people prove their true worth. This worldview produces characters who shun all pleasant impulses and activities that might generate joviality … in favor of long work hours and personal thrift. It produces a culture that celebrates intensity, competitiveness and doggedness."

Positivity and Organizational Change

It has become almost trite to note that "*organizational change is the only constant.*" Many of us re-live this experience every working day. Organizations are undergoing disruptive change on a constant basis (Weitz, 2011). Most often these changes are driven through large-scale projects that are time and resource pressured and place great stress on those driving the projects, and more so on those groups undergoing the change. In my twenty years of organizational change consulting I have seldom been exposed to a large-scale change initiative in which employee emotions and positivity are considered a key success factors for the change – the Denzil Busse, Standard Bank example being an exception.

By default, negative emotions of fear and anxiety are far more common in intense, costly and time pressured change initiatives, particularly where there are implications of job redundancies. These are natural emotional outcomes emerging from uncertainty and excessive urgency focused on cost cutting and profits, rather than keeping people energized and positive so that they are able to perform at their best under pressure. What I have personally observed in these situations of intensive change is that people are more likely to fear change, hide from it, sabotage it and generally resist it with negative talk and destructive collaboration. Little or no consideration in these projects is given to emotions that elicit behaviors of receptivity, open mindedness, appreciation and a positive, high performance work environment.

Hammond (1998, p. 6) comments that "*The traditional approach to change is to look for the problem, do a diagnosis and find a solution. The primary focus is on what is wrong or broken; since we look for the problems, we find them. By paying attention to problems, we emphasize and amplify them*". The focus on what is positive or effective is less common.

Klimosky and Kanfer (2002, p. 10) comment:

"The important point … is that many work behaviors may have strong and consistent linkages to negative emotions. In such cases, attempts to change behavioral patterns without first changing associated emotions are likely to be unsuccessful. Positive emotions have garnered less attention than negative emotions for several reasons: they are less differentiated, they are not associated with specific problems needing solutions, and they are not associated with specific action tendencies thought to be necessary for survival"

Klimosky and Kanfer continue in their description that negative emotions have received far greater attention because they have typically been associated with "*problems needing solutions*" which tends to be a dominant focus in many, if not most businesses.

In my experience, the challenges of organizational change in a modern economy require more expansive and innovative thinking from employees than was required a century ago. Change in a modern economy required the support and involvement of all impacted employees versus a few executives at the top of the hierarchy. More recent research demonstrates that positive emotions broaden people's minds and awareness to new opportunities that change brings and thus stimulates a positive response and adaptability to change. Fredrickson (2009, p. 55), describes the notion of the "*heliotropic*" effect in the plant world (where plants stretch and turn towards the light) similarly happens in humans in the "*light*" of positivity – People turn towards positivity and turn away from the "*darkness*" of negativity. Positivity expands people's interest in new opportunities and change and the notion of what is possible, whereas negativity narrows a person's outlook. I am experiencing this very phenomenon in my current project in Vancouver Canada. The pressures in this $1 billion project are mounting, and numerous leaders are increasingly feeling this pressure. One in particular is responding by becoming punitive and harsh, while another maintains an energetic and positive demeanor, providing encouraging support, regularly smiling and providing positive feedback – her common phrase of encouragement is "*we can do this together*". Where performance is low, the former applies harsh words and frustration, the latter provides support and encouragement. Team members avoid the former, while team members have rallied with the latter and are beginning to show progress. The former team has become fearful and resistant and continues to struggle, while the other is flourishing. This is a practical example of how positivity broadens the mind and cultivates a "*can do*" attitude, while negativity fosters angst, fear and resistance, and narrows the mind to collaborating as a team to develop creative solutions.

Organizational change projects are almost always urgent and time constrained. Costs limitations, competiveness (for example, getting new products to market) and the need for positive results for share price purposes all contribute to this pressure. Fredrickson (2009) notes that positivity is especially important when the work environment requires creative solutions fast – indeed, this is precisely what is needed in the real world example I described above. Fredrickson describes studies conducted with students who

are taught simple positivity techniques (simply having self generated a positive mental image) prior to taking standardized tests, while a control group is not. The positive students perform better than the control group. A further remarkable study conducted with medical doctors showed that simply providing the research group of physicians with a small gift (a small bag of candy) prior to making a diagnosis improved their performance beyond a control group that did not receive the gift. Interestingly, my wife as a senior nurse manager in a large county hospital uses this simple technique often – she frequently provides small gifts of chocolate or other small items to people she manages or with whom she collaborates. It is a simple gesture that says "*I am aware of you as an individual, and I care*". It is remarkable how positively people respond to such seemingly minor positive gestures of kindness and perform better.

Positivity as an Organizational Change Methodology – Appreciative Inquiry
Fredrickson (2009, p. 52) describes positive questioning as the "*launching point*" for Appreciative Inquiry (AI), an approach to organizational change that has "*spread like wildfire through business consulting circles*". She references Cooperrider and Whitney (2008, p. XV), co-founders of the AI methodology, who describe AI as:

"*a philosophy that incorporates an approach, a process (4-D Cycle of Discovery, Dream, Design and Destiny) for engaging people at any or all levels to produce effective, positive change…Its assumption is simple: Every organization has something that works right – things that give life when it is most alive and effective, successful and connected in healthy ways to its stakeholders and communities. AI begins by identifying what is positive and connecting to it in ways that heighten energy, vision and action for change.*"

AI leverages the powerful benefits of positivity – namely that of expanding people's creative capabilities and stimulating energetic collaboration between people in the workplace. Most initiatives are fraught with pressure, anxiety and angst – not only do people going through change feel this, often (as my research in Merit's Engage-to-Change research study shows), managers will bully and intimidate employees during these times of stress and pressure. AI turns this upside down. Cooperrider and Whitney (2008, p. 3) note that the traditional and historical approach to organizational change is based on the principle of problem solving. By its very nature, problem-solving implies there is a problem that inhibits change and once that problem has a solution, effective

change can take place. This focus on problems has by implication a negative perspective – something must be broken and must be fixed, versus what is positive and meaningful and can be leveraged for future change and innovation (2008, p. 3-4):

"Appreciative Inquiry is the cooperative co-evolutionary search for the best in people, their organizations and the world around them … In its most practical construction, AI is a form of organizational study that selectively seeks to locate, highlight and illuminate what are referred to as the life-giving forces of the organization's existence, its positive core … What makes AI different from other OD methodologies at this phase is that every question is positive."

AI includes techniques of asking positive, powerful and provocative questions that uncover the positive, versus the notion of seeking "THE problem". This approach is similar to that popularized in the book "*Leading with Questions*" by Michael Marquardt (2005).

Is Too Much Positivity Negative?

I must admit to being somewhat skeptical about what I felt to be an excessive focus on happiness and positivity in the Appreciative Inquiry change model – to the point of ignoring the negative. Dealing with problems (for example in the form of managing risk) is essential for navigating a challenging business landscape; furthermore, the need to focus on these problems is enshrined in the fiduciary responsibilities of corporate board members. While being emphatically supportive of the need for positivity as a dominant focus in organizational change, ignoring negatives or problems seems naïve. For example, while I was impressed with the text "*Strengths-Based Leadership*" (Rath and Conchie, 2008, Gallup Press), I innately felt that ignoring weaknesses is a fundamental mistake – unbalanced in a sense. Zenger and Folkman (2002) in their research of over 22,000 leaders world-wide, describe in detail the need to develop the core strengths that form the foundation of extraordinary leadership, and provide unique insights on the multiplying impact of powerful combinations of strengths. But they do not ignore or underemphasize weaknesses and the risks of not overcoming what they refer to as "*Fatal Flaws*".

Indeed, Fredrickson (2009, p. 135) describes a "*tipping point*" where too much positivity may be dangerous – ignoring negatives (Zenger and Folkman refer to them as "*Fatal*

Flaws") can be damaging. Fredrickson however describes the need for balance, and refers to this balance as "appropriate negativity". Negativity that is appropriate is important to focus on for purposes of identifying real problems and overcoming them to avoid risk and achieve success. In my view, it is important to place some focus on negative issues for purposes of overcoming "Fatal Flaws" and major risks. A key question from my perspective is the manner in which we view these problems or challenges – do leaders become anxious, harsh and punitive and create a negative focus on problem solving, versus an energetic, innovative and collaborative environment to solve these problems? The former approach is destructive. The latter is constructive despite the focus being on a problem or risk issue. The excessive focus on the positive to the exclusion of negatives is risky. Gareth Cook, a Pulitzer Prize-winning journalist, in an article entitled "*The Darker Side of Happiness*" (2011), comments:

Now, though, there is gathering evidence that happiness is not what it may appear. A string of new studies suggests that the modern chase after happiness--and even happiness itself--can hurt us. Happy, it turns out, is not always the way you want to be. To be happy is to be more gullible. Happy people tend to think less concretely and systematically; they are less persuasive. A happy person is less likely to discern looming threats. "We have put happiness under the microscope just like we do with every other mental state," says June Gruber, an assistant professor of psychology at Yale University, who coauthored a recent review of happiness research, "and we see that there is this dark side."

There is strong argument that a focus on negative aspects of life and work is important for survival – it's the balance between the positive and the negative that is important. As Fredrickson aptly describes "*without negativity you become Pollyanna with a forced clown smile painted on your face. You lose touch with reality. You are not genuine. Unchecked, levity leaves you flighty, ungrounded and unreal. Appropriate negativity grounds you in reality*".

My initial exposure to Appreciative Inquiry supports this view – AI can be and in my experience has in some cases been perceived as "Pollyanna-ish". I have personally received a degree of dismissive "eye-rolling" responses to what is viewed as an impractically positive approach to my consulting style and approach. In my view, some

of the language used in certain of the writings on AI could be construed as simplistic and naïve.

Positivity and the Changing Nature of the Modern Workplace

The workplace of today is very different from the workplace in the first half of the twentieth century. The notion of the work and employment "*contract*" has changed significantly in the last few decades (Marciano, 2010, pg 9). It is a fairly recent phenomenon that people work for more than just a paycheck. The collective body of research and experience in the past half century has shown convincingly that people are more motivated by the intrinsic value from the work itself, as well as the pride realized from working for a company with a positive reputation, than from just a paycheck. It is remarkable however that still in 2011, so many organizations and managers still rely on fiat on the one hand and material rewards on the other, as the primary mechanisms for employees to change, and evidence shows that neither work effectively.

The notion that employees who are happy in their work – or as Archor (2009) describes it are motivated by the fact they are able to pursue their life goals and reach for their potential through their work – is a fairly recent and primarily Western phenomenon. Prior to the mid 20th century, work served primarily as a way of "paying the bills" – not to suggest that this is not an aspect of work today for many people, (indeed becoming more urgent during difficult economic times such as we are living in over the past few years of the "Great Recession"). However, in the past sixty years or so there has been a significant shift in the degree to which people place importance on gaining life meaning and purpose from work versus simply making a living. In Merit's Engage-*to*-Change[SM] research referenced earlier, a remarkable 34% of respondents indicate that, given the opportunity, they would work for *less* money for another company that cared about and engaged its employees more effectively. A remarkable 66% of respondents either plan to look for opportunities elsewhere in their companies (29.8%) or plan to actively seek employment with other companies (36.5%) as the economy improves. Overall, this is not a good vote of confidence for employee happiness and motivation for many of the companies represented in this study.

Despite a large body of research, as well as experiential evidence, that reward and recognition programs do not work in the long term to motivate organizational change

and performance, companies today still use them (Marciano, 2010). While there are some situations – like motivating short term changes in behavior – that may be suitable for the use of reward and recognition programs, most that I have experienced have failed to achieve their intended results, namely enhanced employee performance, commitment and motivation. The primary reason for this, as described by Marciano, is that "*programs don't fundamentally change employees' beliefs or commitment to their jobs; they just change their behavior during the course of the program*". Based on this statement, one could argue: simply don't make it a program that ends. Keep it going forever!! Unfortunately, research and experience suggest that this does not work either.

For example, most companies that I have worked for or with have had some form on ongoing, annual performance salary increase and bonus system. In no case have I felt motivated by these programs and my anecdotal experience is that employees have not either. Indeed, incentive and reward programs often create greater negativity. The reason is that employees are disconnected from the program – in other words they do not have the notion that they really impact on the outcome. Secondly, they begin to view the program as simply an annual event that becomes part of the company's compensation system versus being a motivator. Marciano comments that these kinds of programs are de-motivators and negative when employees do not get a big enough increase or bonus. These approaches are barriers to positivity and inhibit change and innovation.

Positivity Techniques – Reversing the Negative Spiral

As I described in the previous section, "*change is the only constant*" in companies during the new millennium. And with change that is driven by the need to be competitive or to reduce costs or be more efficient and productive, organizational change can create a pressurized and stressful work environment. This stressful work environment can create exactly the opposite of what is needed to be adaptable to the change all around us. Leaders and managers can apply harsh tactics to produce the results they need to meet their obligations. Toxic leaders can abuse and intimidate their team members and co-workers. Employees become fearful, distrustful and negative. An organizational downward spiral occurs. Fearful employees narrow their outlooks rather than open their thinking to innovative ideas. They are less creative instead of actively seeking greater opportunities to meet company goals. Increasing time is spent discussing

negative rumors versus brainstorming new ideas. Time off sick increases, safety in workplace deteriorates and the overall deterioration of company performance accelerates. How do many leaders respond? More pressure, and more harshness and more negativity. The result is exactly the opposite of what is intended. This downturn spiral is predictable. Fredrickson (2009, p. 161) describes this spiral:

Negative emotions – like fear and anger – can also spawn negative thinking. This reciprocal dynamic is in fact why downward spirals are so slippery. Negative thoughts and emotions feed on each other. And as they do, they pull you down their abyss.

It is important to note that the techniques described below, however simple, can apparently have a lasting impact on organizational culture and individual employees. Lyubmirsky, Boehm and Sheldon (2011) comment that "*engaging in happiness-increasing activities (such as committing to important goals, meditating, acting kindly towards others, thinking optimistically or expressing gratitude) has the potential to improve levels of happiness for significant periods of time.*"

"Spiral Up" to Constructive Change

The negative spiral can be stopped and reversed. And for organizational change to be effective and efficient I believe this negative spiral must be reversed. While I firmly believe negative issues must be addressed ("risk" in project parlance) for effective organizational change, our challenge is dealing with risks and problems positively and constructively. Indeed, I apply certain of these techniques on my own consulting practice to good effect. However, they can only be as effective as the broader organization and project will permit and support; furthermore, positivity needs to become a core competence of the organization if the "spiral up" is to be truly effective. The following techniques describe a sample of the methods to achieve this outcome.

Technique 1: Decrease negativity

Negativity is more powerful than positivity – it has greater impact. Frederickson (2009) describes the scientifically confirmed "negativity bias" as "*bad is stronger than good*" - the effects of positivity are more subtle (and therefore have to be more frequent) in comparison to negativity. When employees are faced with a negative experience alongside something positive, they will tend to focus more attention on the negative –

much like the reaction most of us have when danger is present – our "*fright, flight or freeze*" response is activated. Frederickson describes the "*positivity/negativity ratio*" that has been independently demonstrated by numerous scientific research studies – a required minimum of at least three positive experiences to 1 negative. The "*positivity offset*" principle suggests that while most people experience more positive emotions on average than negative, unless the positive outweigh the negative by a 3:1 ratio, there is little or no difference in their levels of happiness or success (or, as Fredrickson calls it, "*flourishing*"). The negative denominator is more powerful, so companies need to focus here to begin.

Technique 2: Eliminate "Toxic" Leadership

In a recent research study that the Merit Resource Group and I launched in the San Francisco Bay area, a staggering 37% of respondents indicated that they were personally bullied or intimidated—or they had witnessed others being exposed to this kind of behavior at least monthly, weekly or daily. It is even more remarkable given that a high percentage of respondents were management and executive level leaders (Merit's Engage-*to*-Change[SM] Research).

While it would be important to understand how these respondents interpreted "*bullying or intimidation*", it is apparent from numerous other research studies, as well as anecdotal and personal experience, that management and leadership in many companies do not stimulate positivity in the workplace. It is essential that leaders and managers have a "positivity bias," understand the techniques, and have the necessary skills for reducing negativity and increasingly positivity. At its essence, I believe this is at the core of the ability to lead organizational change. While discussing how to achieve this goal is beyond the scope of this paper, recognizing the existence of this cornerstone is important as a basis for discussing the tools and techniques for improving adaptability for change.

The following are a select number of techniques that various researchers and practitioner propose for reducing negativity in one's life. What I have done with certain of these in this paper is to interpret them in a work setting:

Technique 3: Modify the situation:

Fredrickson (2009) describes a technique of changing interpretations of events that may cause negativity in one's life. An example in the workplace could be an extremely negative work colleague. Hearing constantly negative dialogue is not only exhausting— it also can be contagious to others. A powerful technique is to view these situations as a challenge – appreciate the opportunity to test your capabilities to modify the situation with subtle modification techniques. People often use negative comments to get attention (even adults). In other cases negativity can be a call for help. Being mindful of these drivers, the use of listening and reframing techniques (such as simply paying attention and listening) may be all that is needed. If this does not alter the negativity, asking questions about the logic behind their negative views can begin to alter the context of negative dialogue. Pointing out alternatives to their negative viewpoints can move the conversation in a positive direction. I personally use this technique with my brother who lives in Malta. He is an accomplished artist and is constantly challenged by the sight of trash, discarded cars, appliances and other garbage as he is painting landscapes on the magnificent coastlines of Malta. His eyes tend to scout out the ugliness rather the beauty. When visiting him I will simply listen and most often he will eventually comment that Malta is generally a beautiful place to live despite the dumping of garbage.

Technique 4: Break the negativity cycle:

For leaders and managers, a valuable technique when faced with a negative employee is to point out positive aspects of what they may be ranting about. For example, when an employee is bemoaning the poorly implemented technology system, break the negative cycle by describing the benefits when it ultimately is implemented. One can even reframe the context of a difficult system: you would not have had the opportunity to learn the system as thoroughly if the implementation had been seamless. The very fact that it was challenging demanded the need to roll-up your sleeves and really learn the system. Again, using the example of my brother, when simply listening does not work, I will gently observe the magnificent cloud formations over the ocean, while he is ranting about the rusted car carcasses lying abandoned at the base of the cliff.

Technique 5: Increase Positivity

While reducing negativity gets the biggest "bang for the buck" in terms of Fredrickson's 3:1 ratio, ultimately it is the positive experiences and emotions that move people to the tipping point (Fredrickson, 2009, p. 179). Reducing negativity negates the potential for a negative spiral, but it's positivity that moves people forward and allows individuals to flourish. In the business world when experiencing large amounts of change, reducing negativity limits resistance and the potential for sabotage. But it is positivity that opens people's minds to the opportunity that change brings and stimulates the creativity that maximizes the opportunities presented by change in the workplace. The five techniques that follow are by no means the only ones available, however they are five that I personally have experienced and observed as powerful, and that the research literature rates as impactful.

Technique 6: The "Big Picture" at work – Find positive meaning

This is more a personal perspective than one based on scientific research and readings – it is primarily based on my own 30 years of working in challenging organizational settings. While Arbor and Fredrickson amongst others describe a variety of tactical tools and techniques for developing positivity in life and the workplace, finding positive meaning in life is for me the most important. It provides the big picture context that makes all of the "*life is difficult*" experiences (a Scott M. Peck quote) meaningful. The tactical tools and techniques are magnified in strength as they take place when a person has purpose in their work. My personal mission is to help companies and people navigate difficult change in a manner that not only brings business benefits, but enriches people's lives – allowing them to deal with changing life circumstances in a more constructive and positive manner. With this end in mind, I tend to explore every difficult project that I am on with a lens of what I can learn so that I have a richer set of experiences from which to draw in my consulting practice. The more challenging, the more valuable. For people who work simply to earn a living and pay the bills, a "big picture' that provides long term meaning may be lacking. Although a difficult exercise, beyond the scope of this paper, finding purpose and meaning in work is, in my experience, essential as a "multiplier" for the tools and techniques discussed next.

Technique 7: Apply Strengths in the Workplace

I am a strong proponent of the "strengths-based leadership" philosophy of Tom Rath and Barrie Conchie (2008) as well as the work of Zenger and Folkman (2002). People that have the opportunity to do what they do best are far more likely to flourish (Fredrickson, p. 189). While this is part of Technique 1 above (from a career perspective), it can also be a tactical approach day by day. For example, my wife is a nurse manager at a large country hospital, and has almost 100 nurses reporting to her. Although her job requires many rather mundane tasks, she specifically focuses on the opportunity to apply her strengths for coaching and developing certain of her nurse reports and dealing directly with patients. It is in these areas that she finds her greatest meaning and purpose when the drudgery of many mundane or negative tasks or experiences have the potential to become overwhelming.

Technique 8: Connect with Others

Edward Hallowell (2011, p. 35) describes the notion that doing things with other people, particularly when that work is valuable and contributes to something important, is maximized when performed with others. The ability to share successes and positive experiences is a multiplier versus simply experiencing a positive experience in isolation. As I described above (Technique 1) above, it is multiplied even more when the work effort is done for long term purpose with the "big picture' in mind. In research on Employee Engagement in the workplace conducted by the Gallup organization (Crabtree, 2004), highly engaged employees are much more likely than others to say that their organization "*encourages close friendships at work*":

"Eighty-two percent of engaged employees showed agreement by rating the statement "my organization encourages close friendships at work" a 4 or 5 (on a 1-5 scale where 5 is "Strongly Agree"), compared to 53% of those who are not engaged and just 17% in the actively disengaged group."

Positivity in the workplace is contagious. Hallowell (2011, p. 84) describes the dyadic and hyperdyadic spread of happiness in the workplace whereby positivity is spread exponentially when people in the workplace form social networks. This is a powerful

tool for managers who can create opportunities for employees to get together in and outside of work to get to know one another and develop trusted relationships.

Technique 9: Find Ways to Develop New Skills

Managers and leaders have a unique opportunity – particularly in the current economic environment - to remind team members that work is a privilege and learning new skills is an even greater privilege. Achor (2010, p. 6) describes an experience he had in Soweto, South Africa. I lived within 10 miles of Soweto for most of my life, going to high school, college and eventually working in Johannesburg. Achor describes his sadness while teaching at Harvard Business School witnessing smart students bemoaning the hard work and stress of being at one of the leading universities in the world. On the other side of the world is Soweto, a place he personally had the opportunity to visit, where thousands of previously disadvantaged children now attend decent schools after the Apartheid system was abolished. When he personally asked a groups of classroom children the question "who likes schoolwork?", the great majority smilingly and enthusiastically put up their hands – they view schoolwork as a privilege, something most of their parents did not have the opportunity to experience. On the other side of the world, in the United States, this question, says Achor, is more often met with few positive reactions. Managers need to create an environment in which employees view work as a wonderful privilege and opportunity, in which learning new skills provides the opportunity to grow and add greater value to the others and the world.

Technique 10: Expectancy Theory Applied in the Workplace

Problems and challenges in the workplace can either be presented as issues of great concern, with seriously negative implications, or positioned as challenges that are exciting and can produce learning and growth – same issue, different lens and a completely different expectation from employees. Achor describes a remarkable study performed in Japan (2010, p. 69). Researchers blindfolded a group of students and told them their right arms were being rubbed with a poison ivy plant. Afterward, all 13 of the students reacted with the typical symptoms of poison ivy despite the fact that they had not actually been rubbed with the plant at all. Achor suggests that this is explained by "*Expectancy Theory*", in which our expectations create brain patterns that cause reactions as if they were real. I have applied aspects of this in my project work. One example was with a project team that I inherited some years ago. This team's members had done a

rather poor job of creating and managing their project documentation. A project audit resulted in a negative rating and could have created a negativity spiral, given the intense pressure members of the project team were under. I presented the need for an enhanced document management system with a highly positive and fun approach – that of a game or puzzle to try and find and move documents, with a prize at the end. The expectation was that this would be fun, and with this expectation, it was.

Summary and Conclusion

It is abundantly clear that being happy at work is a lot more important than simply coming home from work with a smile on one's face – it is a cornerstone of individual, team and organizational performance. In retrospect over my career, and my years of study, it is remarkable to me that the subject of happiness has been virtually absent. While in recent years, the notion of employee satisfaction and more recently employee engagement have become a more significant focus, less has been discussed on the subjects and benefits of individual happiness or positivity. Indeed, as previously noted, in my personal experience, these concepts were more often scoffed at than taken seriously in the workplace. More recently, positivity and happiness are becoming better understood. Companies like Google, SAS, Whole Foods Markets, and Cisco Systems (Hallowell, 2011, p.31) are applying techniques that promote happiness, along with the benefits that emerge from happy and engaged employees. But I believe that we are a long way from having positivity as a basic cornerstone of business practice. The methods and tools that many of my contemporaries learned in previous decades do not become "*un-learned*" easily, and organizational cultures do not change rapidly either. Much more progress is needed, and methods such as Appreciative Inquiry being used as a positivity-oriented change management approach provide hope, and as successful companies such as Google lend legitimacy to these methods and approaches, progress undoubtedly will be accelerated.

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The Overview Effect and the Camelot Effect

Frank White

The story of King Arthur and his Knights of the Round Table has been told and retold for centuries. At the heart of the legend is the mystical city of Camelot, where Arthur held court and the knights gathered before embarking on their quests.

To this day, debate rages over whether there was ever a "real Camelot" and/or a "real King Arthur." Numerous sites in Britain are said to be Camelot's location, and I have visited one of them in South Cadbury. King Arthur and Queen Guinevere are said to be buried in nearby Glastonbury.

Skeptics argue that these stories are myths, meaning they are untrue and have no historical grounding. However, the debates about "history vs. myth" obscure the *meaning* of the narratives that are passed on century after century. The discussion overlooks the fact that most history has an overlay of myth, and most myth has a foundation in history. For this reason, I have coined the term "mythis" (plural: mythies) to describe these tales.

Moreover, these debates would easily subside if we understood Camelot and similar locales to be as much a state of mind as a physical place. As Charles Smith writes in *The Merlin Factor*, Camelot is:

Not so much a place as a moment in time when life is a work of art. Camelot happens when great accomplishment, surprise, and cooperative effort brilliantly coalesce to acknowledge that this is a "great place to be." [1]

Camelot is among the most enduring and important of these mythies, and there is a line in the 1960's Broadway musical by the same name that echoes Smith's insight. When he first meets her, King Arthur sings to his Queen-to-be, Guinevere: "In short, there's simply not…a more congenial spot…for happily-ever-aftering, than here in Camelot." [2]

Smith also notes that what makes Camelot possible is a leader who is open to it and who integrates the rare qualities of personal vulnerability and strength of character to take bold

and extraordinary action for the success of the kingdom and the well being of the people.[3] The Arthur archetype is precisely this kind of ruler. He comes to the throne as a young man of questionable birth, with a knack for empowering others rather than taking all the glory to himself. [4]

Camelot resurfaced in the past half-century not only on Broadway but also in a film based on the musical, a movie called *Excalibur*, and as a description of the brief Presidency of John F. Kennedy.

The linking of President John F. Kennedy's administration with Camelot represents a unique manifestation of the myth, and one that has been discussed at length, but often with a flawed understanding of what really took place from 1960 to 1963 in Washington, DC.

The typical description of the birth of the so-called "Camelot myth" in connection with the President is that Jacqueline Kennedy invented it after his death, as an attempt to burnish his image before the historians started defining him. Meeting with journalist Theodore White a week after the assassination to discuss Kennedy's legacy, she brought up the Camelot connection, recalling how the president enjoyed listening to songs from the musical:
This line from the musical comedy's been almost an obsession with me.
At night before going to bed... he'd play a couple of records… It was a song he loved… "Camelot."
"Don't let it be forgot that for one brief shining moment there was Camelot." [5]

However, she also revealed something more, i.e., that Kennedy had been fascinated with the Arthurian legend from his youth, when he had been ill and often confined to bed, where he spent much of his time reading:
History made him what he was...he sat and read history...all the time he was in bed this little boy was reading history, was reading Marlborough, he devour[ed] the Knights of the Round Table...if history made Jack that way, made him see heroes, then other little boys will see...men are such a combination of bad and good… He had that hero idealistic side but then   he had that other side, the pragmatic side… [6]

This passage describes a President deeply influenced by Camelot, and suggests that the link began long before the interview of the widow by the journalist. Instead, he appears to have structured his administration to mirror the court of Arthur. Indeed, in the early 1960s,

Washington, DC was alive with the energy of the young president and his "New Frontier." Young and old embarked on quests with the Peace Corps, Vista, and as part of the civil rights movement. When we view the Kennedy years in this new way, everything that happened then takes on a different meaning. In particular, we see the Apollo moon program, the greatest quest of all, in a new light.

King Arthur's task was clear, especially as it was described in the film *Excalibur,* which remains one of the best explications of the story to date. His challenge was to unify the fractured realm of Britain or it would not survive. In the key moment of the movie, Arthur sends his knights out to find the Holy Grail, which is actually something other than a physical object. In fact, the Grail is the unity of the kingdom under Arthur: "One land, one king." [7]

By analogy, the central quest of Kennedy's time was the unity of our planet, a place that was sharply divided by the Cold War and threatened with annihilation by nuclear conflict. Having just pulled back from the precipice that the Cuban Missile Crisis represented in 1962, Kennedy seemed to feel urgency to locate this modern Grail, and the Apollo astronauts became his "Grail Knights." Though he did not live to see it, they did find the Holy Grail of our era -- the "Overview Effect," or view of the Earth from space and in space. [8]

Until recently, historians of the Space Age have seen Kennedy's commitment to Apollo as a competitive effort to defeat the Soviets in a "space race." However, new research has shown that the President reached out to his rival, Nikita Krushchev, on many occasions to propose a join US/USSR moon landing. [9]

Though the Soviet leader rebuffed the President initially, his attitude seemed to be softening shortly before the assassination. Moreover, Kennedy proposed an even bolder approach to the high frontier in a speech at the United Nations in September of 1963:
Why…should man's first flight to the moon be a matter of national competition? Why should the United States and the Soviet Union, in preparing for such expeditions, become involved in immense duplications of research, construction, and expenditure? Surely we should explore whether the scientists and astronauts of our two countries — indeed of all the world — cannot work together in the

conquest of space, sending someday in this decade to the moon not the representatives of a single

nation, but the representatives of all of our countries. [10]

As it turned out, the Apollo astronauts went to the moon without Soviet cosmonauts as partners. Nevertheless, they did discover the Holy Grail of their time, the unity of the planet that served as a context for its incredible diversity.

In the words of Apollo 17 astronaut Gene Cernan, the last man to walk on the moon:

"You look back 'home' and say to yourself, 'That's humanity -- love, feeling, and thought.' You don't see the barriers of color, religion, and politics that divide this world. " [11]

Seeing the unity of our Earth is truly a matter of perspective, a shift in worldview. Once the astronaut returns to the surface, diversity reappears. The planet is a holon -- a whole that is also a part, and this is a key insight of the Overview Effect. As I have written in my most recent book, *The New Camelot:*

This is why the Overview Effect is so critical: it offers us the direct   experience of unity/diversity that simply was not available in all the millennia of human history until the 1960's. It is the true Holy Grail of our time. [12]

Charles Smith expands this idea with his distinction between Glastonbury and Avalon, two other legendary locales in England. Glastonbury represents the physical world of business and doing (diversity), while Avalon represents the spiritual world of transcendence and being (unity). Speaking of an organization that experiences both, Smith says,

"When Glastonbury and Avalon merge in the Round Table, the company   finds itself in Camelot." [13]

Just as there is an Overview Effect, there may also be a "Camelot Effect." The former is the object of the quest, while the latter is the quest itself. The Camelot Effect reflects our need to create a "space" in which a new and better world might exist, not only as a momentary experience of greatness but also as a continuing reality. [14]

As more of us experience the Overview Effect, then, might the planet Earth itself become our "new Camelot?"

Notes

1. Smith, C., *The Merlin Factor: Keys to the Corporate Kingdom*, Kairos Productions, 1995, p. 4.

2. Lerner, A. and Lowe, F., "Camelot," 1960.

3. Personal communication from Charles E. Smith.

4. White, F., *The New Camelot: Volume One: Camelot and the Overview Effect,* Kindle Book, 2012.

5. Ibid.

6. Ibid.

7. Boorman, J., *Excalibur,* 1981.

8. White, F., *The Overview Effect: Space Exploration and Human Evolution,* AIAA, Reston, VA, 1998.

9. White, *The New Camelot.*

10. Ibid.

11. White, *The Overview Effect,* pp. 183-184.

12. White, *The New Camelot.*

13. Smith, *The Merlin Factor,* loc. sit.

14. White, *The New Camelot.*

Leading Women from the Ballroom to the Boardroom
Shaping the Gender roles in the Shrinking Workforce

Valerie Naidoo

As we enter the 21ˢᵗ century the dynamics of the workplace are changing. Leading women from the ballroom to the boardroom and empowering them professionally, personally and socially is bringing about a paradigm shift. Encouraging women to strengthen, explore, express and embrace their self image and presence in the workplace gears up towards breaking the gender biases by offering women a setting to excel in the 3 main domains (personal, professional & social). Women are models for raising their kids (some do so singlehandedly) they face their fears, live alone in foreign countries, run their homes, drive classy cars, are there for their families and friends, are bona fide domestic goddesses, they host great parties; they are the givers of live and strength; these women should be celebrated both on the personal and professional platform.

These are woman who are on-the-edge-of-their-seats ready to make things happen and initiate a culture of difference. These are women who are co-creating their own future and positively impacting others within their circle so why do these same women second guess themselves in the work place and shrink in the face of their success? This very same woman becomes a doormat in the workplace, overlooks her talents and tends to dish out praise easily! I do support women who allow their femininity to create collaboration in the work place but I do not endorse the belief of giving into the status quo out of fear of upsetting the apple cart. From a Human Resource perspective, no organization wants a trouble maker with hormones all over the place but by choosing your battles wisely, finding your voice appropriately and handling situations with finesse you will actually deliver desired results and will inevitably earn the respect of your superiors.

As an Interview Coach & Recruiter, I have interviewed over 100s of female candidates and have always been amazed at how different women interview when compared to men. Women tend to shy away from salary negotiations, whereas their male counter parts would not think twice about negotiation if they thought that the proposed remuneration was not reflecting their value. Women tend not to negotiate their salaries because they feel that they

should be grateful for being offered the job or maybe they feel that negotiation would cut their chances of getting the job or they might be branded as bossy and less feminine. The shrinking workforce does not do much to deter women from this way of thinking and behaving.

Dating back to the traditionalists who believed that the office was no place for women, this bias, unfortunately has thrived for many decades and still subtly dominates the mind set. Today's modern organizational culture adopts polices for the purpose of affecting the work/life balance such as paid family leave, time off for child care, etc. however, women are overlooked for promotions or for senior roles because they assume these non-work type responsibilities. Unfortunately there is an unspoken protocol that the alpha male leadership strategies still prevail and these biases towards women exist regardless of whether you are in the Western or the Arab world.

Aung San Suu Kyi is one of my role models and an example of a woman operating in her greatness. Aung San Suu Kyi demonstrates greatness for her work in Burma and the rest of the Burmese people. She is known world-wide for spreading greatness to her people. This brave 5 foot 2 woman has led armies, endured military house arrest; she is a mother and was a wife. She experienced loss of her husband at the tender age of 42 but she still serves her people. She defies limitations to fight for the justice of her people. How can more women learn from her and project this strength in the workforce?

To the smart savvy women out there

- Statistics prove that men easily take the lead when it comes to rubbing shoulders, however women often feel uncomfortable about reaching out, playing politics and doing business networking. Reversing this perception will work wonders within the organizational culture. By working to effectively build enriching, rewarding and professional relationships on all levels, regardless of whether we are referring to stakeholders, colleagues or directors, this will improve levels of confidence and the way others see us. I suggest forming a female networking platform/ forum in the office. This will help women pull together to create a woman friendly culture in the workplace.

- Embrace office politics instead of running away from them by understanding the politics at play in your organization. Pay careful attention to how the most successful people within your company behave

- Adopt an attitude of addressing your fears by drawing close the very thing you fear. For example, you might be shy and you fear speaking up during company meetings or doing presentations, face your fear by becoming more vocal. Take baby steps by overcoming small fears in your daily working life. Try attending a public speaking seminar or become a member of a public speaking group such as "Toast Masters".

- Attend networking/ team building events, work socials: This will boost your confidence, give you an opportunity to bond with team mates and to interact with like minded professionals during networking.

- Learn a new skill which is related to your job and company and put you ahead of the competition.

- Speak up: If you are striving towards a promotion and have been working towards it, let your goals be subtly known to your directors/senior management while taking action daily to achieve your goal.

- Find creative ways of sharing your perspectives and presenting your own ideas that would help improve processes at work, introduce refined methodologies. By striving to work towards the betterment of productivity and performance, you will become a part of the solution. You will gain recognition for this from your superiors.

- Find mechanisms to cope with juggling being a mother, a wife, a home executive and an employee. Some days might be more stressful than other days. Get a support structure outside work to help you cope with the pressures of life.

- Don't expect favors because you are a woman; be willing to go the extra mile. This might require staying behind for an additional 30 minutes to complete a piece of task, do so whole heartedly.

- Dress the part; if you want respect then you've got to command it. Your dressing speaks volumes about you.

- No need to emulate your male counterparts but do act and speak with confidence. Flirt only in the ball room and not in the board room.

Over the next decade, more women will be embracing upper level management roles and holding directorate positions despite the odds being against them. Women will be instrumental in reshaping the 2020 workforce and bringing about revolutionary changes.

Women are indeed the accelerated gender in the workforce; this just needs to be realized and these gender bias perceptions will soon begin to evaporate. This change needs to first start with women. Ladies, the red carpet is being rolled out, be the first to own your achievement and success and let the F factor shine.

Personality Disorders and the Workplace

Kevin Weitz

The Diagnostic and Statistical Manual of Mental Disorders Fifth Edition (DSM-5) defines a personality disorder as an "*enduring pattern of inner experience and behavior that deviates markedly from the expectations of the individual's culture, is pervasive and inflexible, has an onset in adolescence or early adulthood, is stable over time and leads to distress or impairment*". Cavaiola and Lavender (2000) describe personality disorders as a "*special group of psychological disorders of which the general public and most workplaces are generally unaware*". These are potentially more destructive, they say, because they are generally difficult for the layperson to identify, and undoubtedly even more difficult to deal with in the work environment. Personality disorders are long standing disturbances in personality that usually begin in adolescence and continue through adulthood. The authors describe how these behaviorally affected individuals manifest in the workplace with repetitive patterns of dysfunctional behaviors that are disturbing and often destructive. The DSM-5 describes eleven types of personality disorders plus a category of "other":

- Paranoid

- Schizoid

- Schizotypal

- Antisocial

- Borderline

- Histrionic

- Narcissistic

- Avoidant

- Dependent

- Obsessive Compulsive

- Personality change due to another medical condition

- Other and unspecified

This essay will focus on disorder one through ten but will not discuss eleven and twelve. The Diagnostic and Statistical Manual of Mental Disorders (DSM-5) sets guidelines for diagnosing mental disorders. This "bible" of abnormal psychology provides a common reference for all professionals in the field utilize standard definitions and vocabulary. While others may exist, professionals note that there is not enough definitive research on these outliers in order to include them in the DSM at this time. The DSM-5 clusters these disorders into three categories, but does indicate that these categories have "*serious limitations and have not been consistently validated*". Cavaiola and Lavender (2000) are quick to comment that there is no one "pure" type, but these individuals can have various intensities of their disorder and can manifest traits of several of them, thus making it quite difficult to diagnose, even for clinical professionals.

A Cluster – This cluster includes the Paranoid Personality Disorder who is characterized by being overly suspicious and distrusting of others. The Schizoid personality Disorder is aloof and avoids social interactions. The Schizotypal Personality Disorder displays bizarre behaviors and comes across as odd and weird. Some professionals describe that this cluster is related to the more severe psychotic disorder of schizophrenia, but in a milder form.

B Cluster – The B Cluster includes the Narcissistic personality disorder which is characterized by a sense of excessive self-esteem and entitlement. Their constant need to be admired often draws them to positions of leadership and power. The Histrionic Personality Disorder includes behaviors of being overly emotional, shallow in relationships and in excessive need of attention. Individuals with Antisocial Personality Disorder lack a sense of morality and empathy for the well-being of others and the Borderline Personality tend to be excessively moody and angry, sometimes to the point of suicide, tend to have disruptive and emotionally intense relationships and lack a sense of identity.

C Cluster – The C Cluster includes people who tend to be excessively anxious. The Dependent Personality Disorder also referred to as co-dependent, are overly reliant on others for a sense of security and self–esteem. The Obsessive Compulsive Personality Disorder is overly moralistic, a perfectionist and highly critical of others.

NOTE: The following descriptions of personality disorders are taken primarily from the Diagnostic and Statistical Manual of Mental Disorders (DSM-5). Where other sources are

included, these are specifically referenced. Descriptions on how these personality disorders may manifest in the workplace are either my own interpretations or those of other sources, in which case these are referenced.

Paranoid Personality Disorder

This disorder is manifest as a pattern of pervasive distrust and suspiciousness of others and their motives and intent. They assume that others are out to exploit, harm or deceive them even if there is little or no evidence to this. They often express feelings about being deeply injured by others even though they cannot substantiate this. These people are preoccupied with scrutinizing the intentions of others for evidence that they are plotting against them. They find it difficult to believe that others actually demonstrate loyalty or trust. These individuals struggle to confide in others making it difficult to develop close relationships. They will tend to avoid answering personal questions, thinking that this information could be used against them. Causal remarks made by others are often interpreted as demeaning or threatening. They tend to hold long term grudges and are unwilling to forgive perceived insults or slights made by others. They tend to response aggressively to any perceived slight or insult from others making it difficult to maintain constructive relationships for long periods.

How the Paranoid Personality Disorder may manifest in the workplace

Organizational success is almost always based on some element of trust. It is not difficult to imagine how this disorder would not only struggle personally, but would potentially be destructive to, for example, a team's morale and effectiveness. With the workplace of the future being more based on agile teams forming and moving from one project to another, the need to innately trust others – at least initially – is essential, and then to base trust on factual evidence. These individuals are struggling to do this. Moreover, in this "hustle and bustle" of working together under time and cost pressures, tension is inevitable and a degree of team competitiveness is not uncommon – this disorder would tend to misinterpret common competition and minor frustrations amongst team members as plots to make the individual fail or as targeted backstabbing. The holding of grudges and aggressive responses to team members would quickly alienate this type of personality from the team. A greater challenge would be when this personality type has emerged as a team leader and has greater leverage across all members of the team. I would imagine that cases such as this, in which this personality type is able to escalate to a team leader position is in industries,

such as science, medical and engineering where intelligent people can progress good engineers for example, and then be promoted simply because they are good engineer rather than a good people manager.

Cavaiola and Lavender (2000) describe the likely behaviors of an individual with Paranoid Personality Disorder in a management position. This person is likely to be extremely distrustful and suspicious of subordinates, often thinking that their reports are scheming to undermine their effectiveness and will tend to be defensive with good ideas posed by team members. They may misinterpret high levels of motivation amongst peers or subordinates as an attempt to show them up or get their jobs. Developing talent is likely not a role that these individuals will be good at. They are likely to be micromanagers given that they will be suspicious and distrustful of what subordinates are doing. Of pivotal importance for the paranoid manager is to feel in total charge of everyone in their work domains. They will often respond to circumstances of uncertainty in an extremely harsh manner if they feel out of control. Interacting with the paranoid individual must be centered on their need to be in control. Be as open and transparent with these individuals as possible so as to avoid any possibility of distrust developing. Be cautious of being overly inquisitive about them personally, as this interest can be easily misconstrued. Cavaiola and Lavender also suggest caution about common office joking or teasing however benign it may be given the potential of these individuals believing that they are being picked on, or are the butt of jokes. Effectively, the most effective approach is to interact openly but with caution and to keep the work relationship friendly but at arm's length.

Schizoid Personality Disorder
DSM-5 describes this disorder as a pervasive pattern of detachment from social relationships and a restricted range of expression of emotions in interpersonal settings. They appear to be indifferent to any opportunities to develop close relationships and do not seem to obtain any satisfaction from being part of a family or other social group. They seem unaffected by the criticism or compliments from others—they do not appear to care what others think about them. They are oblivious to the normal subtleties of social interaction. They tend not to respond to subtle social cues, so they appear as inept or socially "bland". For example, they will tend not to reciprocate socially expected smiles or nods that acknowledge social connectedness. They rarely experience emotions of joy or anger and can

appear cold and aloof. The Schizoid Personality Disorder is indicated by the manifestation of four or more of the following:

- Neither desires nor enjoys close relationships including family interaction

- Prefers solitary activities

- Has little interest in sexual experiences with another person

- Takes pleasure in few activities if any

- Lacks close friends other than first degree relatives

- Appears indifferent to praise or criticism from others

- Demonstrates emotional coldness and detachment

How the Schizoid Personality Disorder may manifest in the workplace

In most organizations today, social interactions are common. Companies invest huge amounts of time and money to energize and inspire their employees for the best possible performance. From minor "pats on the back" for a job well done to a more formal recognition for performance, the Schizoid Personality will likely fail to be inspired and will also be unlikely to display any form of positive reaction or pleasure. Similarly, the poor performing individual being coached or managed will also tend to be unaffected by strong criticism from their boss. This appearance of lack of caring could be interpreted as lack of commitment to their work and to the company's goals and aspirations. Given that these individuals appear directionless and tend to "drift" in their goals, the likelihood of them being strongly focused high performers is low. DSM-5 notes that these individuals will likely operate best in work conditions of isolation. One can imagine that the workplace of the future, allowing work to be conducted remotely via the virtual technologies over the internet, with little need for direct interactions with others, provides opportunities for this personality type. Cavaiola and Lavender (2000) observe that the field of engineering appears to attract people with Schizoid Personality Disorder. They can be very successful in this field and as a result of this technical success be promoted to managerial levels. As the authors say, "this is where the problems begin". Precisely the kind of factors that make these individuals good engineers, namely thinking, logic and analytical endeavors, but not the kind of people skills required of a management role. These individuals will tend to be entirely focused on the technical task at hand and will have little or no to emotional quotient.

Schizotypal Personality Disorder

The Schizotypal Personality Disorder is characterized by a pervasive pattern of social and interpersonal limitations and a reduced capacity for close relationships was well as by cognitive and perceptual distortions and eccentric behaviors. These individuals often have ideas of reference (but not delusions of reference), namely incorrect or distorted interpretations of casual experiences or incidences and external events by assigning unusual meaning to them specifically. They are likely to be highly superstitious or preoccupied with paranormal phenomena that are outside their normal context or culture. They may believe they have special powers to sense future events or read the thoughts of others or have special controls over others or influence over events. They may exhibit perceptual alternations such as hearing voices or sensing that someone is present when they are not. Their speech may appear unusual or incoherent and include idiosyncratic phraseology.

How the Schizotypal Personality Disorder may manifest in the workplace

Because these individuals often have an odd appearance, for example in the way they dress as well as in their speech, odd speech patterns and unusual perceptual experiences, they will typically find it difficult to fit in the workplace. They are likely to be suspicious of co-workers, thinking that colleagues may be plotting against them. They are uncomfortable around other people, especially if these individuals are unknown to them. They prefer to be by themselves, and therefore would struggle in a team environment, particularly where there is a high need for collaboration – most often the Schizoid will avoid these opportunities or expectations. Exacerbating this is their predisposition to be suspicious of others. Given their predisposition to present as being odd or eccentric, co-workers will likely be uncomfortable in their presence and avoid being associated with them. This is likely to advance the perception that others are talking about them and possibly plotting to undermine them.

It is best to respect and understand the schizoid's need to be alone and have distance. When interacting with them, do not be overly inquisitive, but rather ask about general work issues and other benign non personal issues or current affairs. Do not be surprised or react negatively if the response you get from this interaction is disinterest. Given the lethargy of these individuals, it is preferable to make specific recommendations about what work should be accomplished and how, rather than pose a question while expecting a detailed

and proactive response. If you are the schizoid's superior, consider using technology such as teleconferencing to provide the individual some a sense of privacy and distance. This might include a quiet cube away from others, or even working from home.

Antisocial Personality Disorder

DSM-5 notes that Antisocial Personality Disorder (APD) is also referred to as psychopathy, sociopathy or dissocial personality disorder. Interestingly, Babiak and Hare (2006) differentiate the psychopath from Antisocial Personality Disorder, which they describe as a broad diagnostic category and may include the psychopath but also may not. They indicate that psychopathy specifically includes such personality traits as lack of empathy, grandiosity, and shallow emotions that are not necessary for the diagnosis of APD. Deceit and manipulation are the major characteristics of this disorder and behaviors in which the basic rights and other societal norms are repeatedly violated. This conduct falls into four categories; aggression towards people and animals, destruction of property, deceitfulness or theft or other kinds of violations of rules or laws. They may repeatedly perform acts that are grounds for arrest, such as threatening others, destroying property and violence. They also tend to display a reckless disregard for their own safety. They can display extreme lack of responsibility. They also demonstrate little remorse for their acts and for damage they have caused. They tend to be callous, cynical and contemptuous of the feelings, rights and suffering of others. Exacerbating the damage that can be caused by these individuals is the likelihood for them to appear self-assured, while this excess will tend to appear cocky and overly opinionated. They can also display a high level of charm, which will appear superficial.

How the Antisocial Personality Disorder may manifest in the workplace

These individuals display an extreme lack of responsibility in the workplace. They will manifest this by, for example, having long absences from work with no rationale or excuse. They tend to have long periods of unemployment with no plan for obtaining an income. They will tend to default on debts, and may have a tendency to embezzle funds or steal from their employers. Their potential to be charming and verbally facile creates the opportunity for them to appear initially as the "wunderkind" in the workplace; however, this superficiality can become evident quite quickly because of a disregard for company rules and boundaries.

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Babiak and Hare (2006) note that some corporate cultures may actually attract the psychopathic personality. Cultures characterized by aggressiveness and success at all costs might find the psychopathic personality appealing, especially in early stages of interviews where the psychopath is at his or her charming best. Cavaiola and Lavender (2000) comment that there are many instances where ruthlessness, cunning, manipulation, deceit and unbridled ambition are viewed as essential characteristics in order to advance in some organizations. No wonder, anecdotally, it appears that so many senior executives exhibit these kinds of behaviors.

Dealing with individuals with APD in the workplace can be tricky. Cavaiola and Lavender suggest caution if you suspect this disorder, as the excessive charm that individuals exhibit can be disarming and they can use many subtle techniques to draw you into their attempts to control and manipulate. The authors suggest the following:

- Set clear boundaries about how they attempt to interact with you. For example, if the individual takes liberties to be overly friendly and puts their arm around your shoulders in apparent friendship – possibly too early in the relationship – be very clear, while being courteous, that this makes you feel uncomfortable and he or she should refrain. Be firm. Do not leave personal information or items in your office or on your desk which are of a sensitive personal nature. Keep security passwords and personal items like keys away from view.

- Keep detailed notes of any indiscretions that may occur.

- Keep someone you trust informed of any concerns you may have about the APD individual's behavior. Be specific but don't speculate or interpret when you do this, simply state your concerns factually.

- Ask for help if you are struggling to deal with the APD's behavior. If you have access to a trusted advisor or counselor, do so.

- APD individuals are masters of manipulation - do not blame yourself if you like you have been manipulated into behavior that is uncharacteristic for you – avoid getting deeper into any scenario that is uncomfortable for you. Rather be transparent about the issue and talk to either counselors or trusted people as early as possible.

Borderline Personality Disorder

The Borderline Personality Disorder manifests as a pervasive pattern of instability regarding interpersonal relationships and their self-image is marked by impulsivity. They usually have a self-image based on being evil and at times have feelings that they don't exist at all. These individuals make frantic efforts to avoid real or perceived abandonment or rejection or separation or the loss of external structure. They are intensely impacted by external environmental circumstances. They may experience inappropriate levels of fear and anger at even temporary periods of separations, for example, where a caregiver may end a session earlier than expected or may arrive a few minutes late. They have an intolerance of being alone and need to have others with them.

These individuals have long term patterns of unstable relationships. They may initially idealize caregivers or partners, demand an extraordinary amount of their time and share highly personal and intimate details about themselves very early in the relationship. This idealization may quickly turn to devaluing them when they perceive that the caregiver or partner is not caring enough or not providing enough personal time or attention. These shifts in attitude to others can be quick and dramatic. They may display extreme sarcasm, enduring bitterness and abusive verbal outbursts.

There is the likelihood of marked and persistent instability in self-image and sense of self. These shifts may manifest as sudden changes in personal goals, values, career aspirations and/or life goals and objectives. These individuals demonstrate worse performance in less structured educational or work environments. They may display high levels of impulsivity in the form of gambling, spending money irresponsibly, binge eating, substance abuse, reckless driving and physical violence. They may also display recurrent suicidal behaviors or threats, or self-mutilation. They display instability of mood, manifest as intense dysphoria, irritability or anxiety. They easily become bored and express chronic feelings of emptiness.

How the Borderline Personality Disorder may manifest in the workplace

These individuals are likely to be attracted to highly structured work environments in which they are working closely with other people. They will likely attempt to develop close relationships with both co-workers and supervisors. They are likely to idealize these individuals initially. Problems may occur when these relationships do not provide the

nurturing they need and expect. For example, if a supervisor who is under work stress appears dismissive, or is non-attentive during a meeting, these individuals are prone to reacting rapidly and dramatically with sarcasm and anger, thus damaging these relationships. As these co-workers or managers then pull back from the relationship with the person, so the Borderline Personality is likely to interpret this as abandonment and may react with angry outbursts or panic and anxiety. These real or perceived losses of relationships can then result in these individuals suddenly changing career goals or direction. They are also prone to giving up just before they are about to potentially achieve a significant work or educational goal, making it difficult to progress in their careers. Cavaiola and Lavender (2000) comment that people with this disorder probably present the greatest challenge to the organizational structure because they have an inability to develop ongoing, stable and sane relationships. They have a profound ability to disrupt the lives of workers around them. Often this disruption emerges from their tendency to have wild swings in their relationships. For example, the Borderline moves from one extreme of thinking and saying that their boss is the best ever, lavishing praise and soon thereafter, after perhaps some perception of being rejected, will swing into hatred and verbal outrage. Subsequently, the Borderline personality can decline into depression and a deep sense of worthlessness.

Cavaiola and Lavender comment that working for a borderline boss can be a "living hell". They describe that these individuals are the most toxic to work with, to the point of potential emotional damage. The more positional power they have, the worse they can be. The authors caution about antagonizing these individuals. Do not engage is confrontational arguments and avoid escalations by imply making them feel validated by saying something like "I hear you" or "I understand the way you feel" (even if you don't). In the most severe cases, the authors recommend changing jobs because there is little one can do to work with the borderline individual. Indeed, in the extreme, they can be dangerous.

Histrionic Personality Disorder
This disorder manifests as a pervasive and excessive emotionality and attention-seeking behavior. These individuals are overly dramatic in behavior with the purpose of attempting to gain attention and constantly be "the life of the party". If they feel they are not the center of attention, they will often do something dramatic to bring attention back to themselves in the form of making up dramatic stories or making a scene. This excessive emotionality

which can initially present as being charming and flattering, (but excessively so), can evolve into inappropriate flirtatiousness, and sexually provocative and seductive behavior. These behaviors are not only directed at people to whom the person is romantically attracted, but also occur in a wide variety of contexts including occupational and professional which can be highly inappropriate in these situations.

These individuals often use physical appearance to gain attention on themselves. They expend excessive effort and money on clothing and grooming. They will often "fish" for compliments regarding how they look and can become easily and excessively upset by critical comments about their appearance or by a photograph that they regards as unflattering.

People with this disorder have a style of speech that is excessively impressionistic or lacking in substance. For example, strong opinions are expressed with emotionality suggesting a deep connection with the topic, but they are often unable to provide detail when questioned by others. Individuals with this disorder are easily influenced by others or by current fads. They may be overly trusting and gullible especially when interacting with people in positions of power who they see as being able to solve their problems and provide them with some sense of attention and importance. They often consider relationships stronger that they really are, and can present themselves as being overly familiar with people whom they barely know.

How the Histrionic Personality Disorder may manifest in the workplace
These individuals will tend to visibly pay more attention to themselves versus the work for which they are accountable. They are likely to be dramatic and attention getting in what they say they can do in order to get attention versus what they actually produce in the long run. Their initial, but superficial charm can become irritating to managers and supervisors when their need for attention is excessive and when they lack delivery on goals. These individuals may be inappropriately flirtatious and to the point of overstepping company policy. Co-workers may feel uncomfortable and may lodge formal complaints about inappropriate comments about their appearance. They will tend to demand excessive attention from managers and constantly seek approval and public comments that make them look good. They may also easily latch onto and will be easily influenced by senior leaders who are able to manipulate them by providing the attention they crave. These are

the personalities that are overly dramatic in meetings and other group work settings, but make little meaningful contribution.

Cavaiola and Lavender (2000) note that it would seem unlikely that someone suffering from Histrionic Personality Disorder would rise to positions of leadership given their lack of emotional control; however, given their assertive and outgoing personality and high energy levels, they often chose and are at least quite successful in careers involving sales, marketing, or politics. The authors comment that when these individuals do rise to leadership positions, it can "spell disaster" for those working for them. The authors suggest being fully aware that these individuals will likely take credit for your work at every opportunity and because they are such blatant sales people, will likely get away with it. Be cautious not to get caught up in their drama, storytelling and gossip. Given their tendency to be in crisis mode all the time, getting caught up in their emotional roller coaster can be draining. Rather keep your distance. HPDs are excessive in their needs for you to get involved in their drama, and given their charm, this can be quite easy in the early stages of knowing these individuals.

The Narcissistic Personality Disorder
The Narcissistic Personality Disorder is a pervasive pattern of grandiosity, extreme need for admiration, and a lack of empathy for the feelings and needs of others. These individuals overestimate their own abilities and overstate their accomplishments often appearing boastful and pretentious. They are likely to simply assume that others also view them and their accomplishments similarly and may be stunned or angry when they find that others do not provide the praise that they feel is justified. They firmly believe that they are superior or unique and expect others to view and treat them as such. They are likely to harshly devalue the contributions of others. They will often express that they can only be understood and appreciated by other gifted or high status people. They believe their needs are above and more important that "normal" people. They will tend to want to be associated only with "the best" in whatever field they are involved with, be that academic, career or simply their personal doctor or hairdresser.

These individuals require constant and excessive admiration and their self-esteem can be very fragile if they do not receive it. They are often charming, but this is almost always self-serving and they will tend to fish for compliments. They have a grandiose sense of

entitlement—for example, not feeling like they should have to stand in a queue at an airport like "normal" people. When they are not catered to or receive the kind of praise they expect and demand, they can become puzzled or furious.

Narcissistic personalities display a lack of empathy for others and have difficulty recognizing the needs and feelings of others. They assume that others are consumed with their welfare. They tend to discuss their own needs at great and lengthy detail, but become impatient and dismissive when others want to discuss their own feelings. They may be oblivious to their insensitivity and the hurt they create in others. They project a sense of emotional coldness and arrogance towards others. They are often patronizing and snobbish.

How the Narcissistic Personality Disorder may manifest in the workplace
These individuals are likely to expect or demand special treatment and be "hailed" for their profound successes, power, brilliance or beauty—at a level way beyond their real capabilities. In the workplace where tangible performance is expected, these individuals will likely either to struggle and possibly express anger and astonishment at their bosses and coworkers for not placing them on a perpetual pedestal. More destructive is the likelihood that they will be calculating and devious in their work relationships in order to get what they want at the expense of others. They are likely to display disdain for "lesser" people they consider weak and abuse the willingness of others to assist. For example, if the narcissistic personality is in a leadership role, they may expect total loyalty and overwork their team members, yet do little work themselves. They attribute all of the successful outcomes to their own superior capabilities and none to the team members who may, for example, have worked over weekends or overnight to produce the results.

Quoted by Cavaiola and Lavender (2000), Levinson (1994) suggested that "organizational narcissism" often occurs when corporate and political executives ascend to higher levels in organizational power structures. The higher an individual rises up the higher one's self esteem becomes, and the less candid is the feedback one receives. The combination of these two, says Levinson, can give rise to narcissistic inflation that leads, in turn, to overconfidence and a sense of entitlement. This can produce an inflated self-image beyond ones real capabilities, and contempt for other individuals and organizations.

Working with a narcissistic boss can be exhausting. These individuals are likely to expect ridiculous hours of work without ever considering your personal situation. I recall working with an individual in a leadership position who expected her team to work over a long Memorial weekend, and set a team conference call late on the final day of the Memorial Day weekend. While we invested many hours in preparation for this meeting, she did not show up, only to find out she was on a boat relaxing with friends. When we raised this issue the following day, she was completely nonchalant and dismissive about ruining the long weekend for her team and their families. Fortunately it is possible to manage these individuals more than some other disorders. Cavaiola and Lavender describe that one should "stick to your agenda, and not theirs". Clearly I missed this aspect of their advice in my previous example. Talking with the narcissist is possible. However, this dialogue needs to be presented in a way that lets them know that you are able to help them be successful. In my pervious example, I was able to sit down with this individual and both firmly set boundaries, as well as provide coaching that her team would perform much better (and she would look better) if she provided some support to her team. As Cavaiola and Lavender describe, providing constructive and balanced feedback is useful with these individuals, but they must feel it is for their benefit.

Avoidant Personality Disorder

Individuals with Avoidant Personality Disorder demonstrate a pervasive pattern of inhibition, feelings of inadequacy and excessive sensitivity to any form of criticism. These individuals will avoid activities in which there is significant inter-personal contact for fear of criticism, disapproval for rejection by others. They will avoid or reject new opportunities for fear that they will fail or be criticized. In any social situation their initial assumption is that people will be critical and disapproving. They will tend to project as shy and acting with restraint and will likely avoid talking about themselves to protect themselves from appearing inadequate.

These individuals have a very low threshold for detecting criticism. The slightest hint of disapproval will result in extreme hurt. They will tend to be shy to the extreme, inhibited and will try to be 'invisible' in social settings to avoid putting their fragile wellbeing in the hands of others. These individuals believe they are inferior, socially inept and personally unappealing to others. They will therefore tend to have a very restricted and insular lifestyle.

How the Avoidant Personality Disorder may manifest in the workplace

Individuals with Avoidant Personality Disorder are likely to struggle in the typical workplace other than the most nurturing and supportive. Cavaiola and Lavender (2000) note that it is uncommon to find an Avoidant individual in a management role, unless they have been promoted because of technical expertise versus people management skills. The Avoidant manager will likely be vague, provide little guidance or direction, and will not provide support or "have the backs" of their team. They are also likely to have multiple excuses for why things don't get done. However, the avoidant personality can be talented and hard working. Cavaiola and Lavender note that their hard work can be an attempt to cover up their sense of perceived deficiencies but given the right support and consideration they can be productive.

The internet has likely been a significant boon to these individuals—who may be more likely to work remotely in the "safety" of their homes without having to brave the social hustle and bustle of the normal workplace. In normal work environments, they are likely to be seen as weak and ineffectual, unwilling to take any form of risk or challenge that they may perceive as potentially embarrassing or where they may be shown as inadequate. Their fearful and anxious demeanor may elicit ridicule from others who perceive them as pathetic underachievers, and in turn this ridicule will confirm their worst fears and doubts about themselves.

Cavaiola and Lavender describe that if a avoidant individual actually rises to managerial level, one needs to anticipate that they will not take risks or support your proposals that have any implication of being risky. Putting pressure on them will not work, rather offer to assist and find ways to present ideas in a non-threatening manner. As a co-worker, an avoidant individual can be a good friend if they decide to trust you. They are likely to need constant reassuring, and support, but are likely to be difficult to work with if you are dependent on them delivering work that you need. Reacting with impatience or annoyance will make things worse, so being helpful and supportive is the best approach.

Dependent Personality Disorder

The Dependent Personality Disorder is manifest by a pervasive and excessive need to be taken care of that leads to submissive and clinging behavior and intense fears of separation.

These submissive behaviors are designed to elicit caregiving and develop out of the self-perception that they are unable to take care of themselves without the help of others. These individuals have great difficulty making simple decisions for themselves, such as what clothes to wear or whether to take an umbrella in case of rain. They present themselves as extremely passive and submissive to others, allowing others to take responsibility for all major aspects of their lives—for example what course of study to take, what kind of work to pursue and what friends to have.

Through fear of losing the support or approval from others, individuals with this disorder have great difficulty expressing disagreement with others, especially with those on whom they are dependent. They will feel so unable to function alone that they will often agree with things that they know are wrong. These individuals are unable to express resistance. They will tend to submit to the demands of others even if these demands are unreasonable. These individuals have great difficulty taking the initiative to begin anything, such as a project or doing anything independently. They lack basic self-confidence to complete tasks and believe they need help to finish what they started. They basically believe that others are better than they are despite possible evidence to the contrary. They visibly present themselves as being inept and requiring constant care and support. They are more likely to function if there is constant assurance from another that they are being supervised. Individuals with this disorder will tend to volunteer or agree to do tasks that are unpleasant or disagreeable to them simply in order to maintain approval and support from others. This makes them easily manipulated or taken advantage of. They will tend to urgently and indiscriminately seek other dependent relationships when another ends.

How the Dependent Personality Disorder may manifest in the workplace
The individual with Dependent Personality Disorder (DPD) will predictably struggle in a normal work environment in which employees are expected to take the initiative and complete tasks without much supervision. It is likely that these individuals would struggle even in the initial hiring process of a career search given that they present themselves as helpless and incapable. They are only likely to function in work situations in which they have clear and ongoing nurturing and support. They are also likely to need work that is more predictable and repetitive versus any projects that require initiative and risk. It is likely that these individuals could be taken advantage of in the workplace by unscrupulous

bosses, who gain their confidences and then require them to do work that is unpleasant or even dangerous or unethical.

Cavaiola and Lavender (2000) note that it is unlikely that these individuals will reach leadership or managerial positions, but if they do it is more likely that they move into these positions because they have pleased their bosses rather than basic managerial competence. They make better followers than leaders. If they do rise to these positions, they are likely to strive to create harmonious work environments in which there is not confrontation with anyone. They are likely to be consensus builders to the extreme, avoiding making difficult decisions. The DPD will want to talk things through endlessly and avoid making decisions in isolation. However, for team members who want to get their ideas recognized, and can work with the DPD in an understanding way, there is the opportunity to shine and to be recognized. In these cases, one can receive a lot of support from the DPD boss, because it can be viewed as win-win. There is the potential for successful outcomes with these individuals, however frustrating the process may be at times.

Obsessive Compulsive Personality Disorder

The primary feature of this disorder is a preoccupation with orderliness, perfectionism and interpersonal control at the expense of openness and efficiency. These individuals attempt to maintain a sense of control through painstaking attention to rules, trivial details, procedures, lists, schedules or formats to the degree that the primary objective of whatever exercise they are involved in is lost or forgotten. They are excessively careful and prone to repeatedly check for possible mistakes and recheck that everything they are doing is correct or perfect, without adequate focus on the intended outcome and timelines. Their allocation to tasks is poor, and they will tend to invest time on trivial detail versus keeping the point of the exercise or project at the top of their mind. Deadlines will tend to be missed and important aspects of the individual's life that are not the current focus can fall into disarray.

These individuals have trouble relaxing and allocating time to leisure. They display excessive devotion to work productivity to the exclusion of relaxation and friends. When they do take a vacation they are likely to take work along with them so they can feel productive. If they do engage in sports or hobbies they will approach them as serious tasks that require hard work and great attention to detail. Their emphasis will be on perfect performance versus fun and enjoyment. They are likely to be harsh with others and will

tend to enforce rigid rules and follow inflexible moral standards and standards of performance. They can be ruthlessly critical of their own mistakes and those of others. They are also likely to be rigidly deferential to authority and rules. They will insist on exact compliance with no opportunity for contextual flexibility or extenuating circumstances. This disorder is manifest by being unable to discard worn out or worthless objects. They can become hoarders of useless items.

These individuals are very reluctant to delegate responsibility to others. They feel everything must be perfect and they can do this alone. If responsibility is delegated, they will insist that it be done their way with no flexibility. They will become irritated with others who suggest alternative ways of doing things, even if these alternatives are clearly more efficient. They are so concerned about doing things the one correct way that they struggle to go along with the ideas of others. They struggle to deal with changes in the way work might need to get done to meet changing requirements. Co-workers are likely to become frustrated by this rigidity. The Obsessive Compulsive Disorder sufferer will often argue that "*it is the principle of the thing*" that it has to be done a certain way.

How the Obsessive Compulsive Personality Disorder may manifest in the workplace
The summary above sourced from the DSM-5 provides a vivid picture of this type of personality disorder in the workplace. Given my many years of work in a highly regulated banking environment, it is interesting to look back at how this personality disorder would likely be regarded as a high performer in many situations. However, in the rapidly changing work environment of today, at least in most industries, these individuals would likely struggle. I can imagine these individuals operating comfortably in many aspects of the military, but not in the creative, rapidly changing work environment of "knowledge work" (for example, in software engineering and design) and particularly where there is intense pressure to "break the rules" to beat the competition and find innovative ways to shorten processes and procedures. Given their struggle to delegate responsibility, or to give recognition to others who may have succeeded by "breaking the rules", they are likely to struggle in a dynamic team environment.

These individuals tend to be project themselves as overly serious, highly controlled or stilted and may appear uncomfortable in the presence of others, particularly in a work environment of "organized chaos"—where people are being innovative and are often

engaged in brainstorming forums. Given their tendency to be stubborn, they are unlikely to be easily accepted into this kind of team environment. More and more, as the workplace is undergoing increasing levels of change in which the average individual is likely to struggle, those with Obsessive Compulsive Disorder are likely to seek out alternative work environments and opportunities.

Cavaiola and Lavender (2000) note that the characteristics of the Obsessive Compulsive often advance to leadership positions, particularly in organizations emphasizing rules and structure. Yet, these strengths are often their failure points as managers. They are likely to be task masters, lacking in emotional expression, nitpicky on trivial detail versus achieving good results. They, will place productivity and efficiency above all else. They are unlikely to provide encouragement or praise for a job well done, because this will simply be their expectation. For reward and recognition they are likely to be the manager who responds "your reward is that you have a job".

Cavaiola and Lavender recommend the following techniques to deal with the OCD person:

- Be very clear about expectations and the implications of these expectations. Suggest other ways of achieving the same result with simpler but equally effective methods. Be detailed and explicit in your ideas.

- Set boundaries about your work-life balance. Be specific and firm.

- Be a team player, but be clear not to stray into allowing the OCD to push you beyond your agreed boundaries.

- Be complimentary to these individuals in order to allay their anxieties or insecurities. But be sure these are sincere.

- Avoid arguments or debates. OCD's cannot admit being wrong. Rather, make them feel like they might have inspired the idea (however hard this might be at times).

- Don't expect praise or emotional support – this is simply a fact of life when working with an OCD individual.

Conclusions

The title of Babiak and Hare's (2006) book, *Snakes in Suites*, is very appropriate. I have encountered many of these snakes in suites over the years. Cavaiola and Lavender (2000)

similarly describe the tremendous damage that employees with various kinds of personality disorders can have on an organization:

> *"… this problem is like a hidden cancer slowly and persistently sucking the life out of productive and viable organizations by creating inefficient management, sexual harassment, excessive litigation, escalating expenses and job related stress. The magnitude of the problems these people cause for their organizational settings are of such as astounding proportions that they may be immeasurable".*

I don't think this can be overstated. Cavaiola and Lavender note that 80% of people they surveyed reported having to deal with someone in the workplace that created huge amounts of disruption and stress. I'm surprised that it was not 100%.

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SECTION FIVE

CASE STUDIES

LIBRARY OF PROFESSIONAL COACHING

The Memory of Flight

Anita Doron

When I met Camille B., she was no longer able to fly. She stood atop the damp coffee house, the tips of her red sneakers just over the edge so that she could bend her toes into the void below. She imagined unfolding her wings, knowing well that all she could feel now is the stinging, excruciating sensation of phantom limb pain. It came at her suddenly, overwhelming her small frame.

Her wings were the most beautiful objects she had ever seen. She used to marvel at them drying on the grassy earth, resting after a long flight. Youthful skin covered the main bone structure, which split at the humerus. The distance between the ulna and the radius was wide and it splintered into tiny, clear cells, divided by artificial metal veins and held together by a transparent film-like substance. There were no feathers, just a complex pattern of these monocrystalline silicon patches. They glistened from the rain. At sunsets, they absorbed the gold hue. When the wind blew underneath, they omitted a gentle vibration. For Camille B., it sounded like the ancestral flutes of a forgotten tribe. She heard music when she flew.

Camille B. was seventeen years old when she first took flight. She was barefoot and wore black, cotton pants and a bathing suit top that allowed for her wings to open and close. She had a leather string around her neck, holding a small talisman she received from her mother. She stood on a grassy mountain. Down in the valley, she could hear grazing animals and the sound of a motorcycle. She begun to run, and took on a relaxed motion forward with her body in a tall, elongated position. As she approached the take off point, she lifted her knees higher and maintained her speed. With her left leg leading, she jumped up, driving with her arms. She waited until she was airborne before she unfolded her wings. The first ten seconds were the hardest. She had to control the rotation of her body and make sure the wings would not collapse, sending her plummeting into the valley. Her tights and stomach were bruised and scarred from the many previous attempts in which she simply could not sustain the flight and fell.

She leapt and opened her wings. She hardened her leg muscles and held her arms tight against her torso to stabilize her body. Past the ten seconds she was still in the air. Slowly, she felt in control. She lowered her left wing an inch and her body dipped in that direction. She saw the grazing sheep and a teenager cutting grass in the valley. They were tiny.

The feeling of that first flight surpassed any intensity she had ever experienced before. She had no frame of reference for this emotion, and she experienced it akin to a newborn, devoid of analysis, pure in the sensation of the moment. She had no thoughts, nor words floating in her mind. There was only silence and awe.

I've been coming to the café for three weeks when Camille B. shared the story of her captivity. We were sitting at the back, after the daily bustle had died down. She had a patch of flour on her chest, in the shape of an unidentified country. Her hands still glistened from the sunflower oil she used earlier to coat dumplings. We stared outside, watching the market wrap itself in the evening dust.

"On the last day of my freedom, I fell from the sky," she said. "I couldn't walk... They captured me just like a dying bird."

She showed no emotion as she spoke.

"They used a saw to cut my wings off. I lost a lot of blood, but never my consciousness. I wanted to be weak and fade, but my mind kept me going. I couldn't shut it off. I had the strangest thoughts. Irrelevant, empty, fleeting little thoughts."

Camille B. looked at me to check if I was paying attention. Maybe she wanted to see if I understood her... if I was the right audience for what she needed to say.

"They kept me in a cage for three years. They asked me questions. They brought in a translator. A priest. A monk in a blue suit. But I said nothing. After a while, I wasn't sure if I could even speak any more."

This was the first time I noticed she had a tiny speech impediment. Just the way she swallowed her vowels, almost imperceptibly. I wondered if this was due to her three years of silence. As if her throat rejected the notion of talking.

"When they finally let me go, all I had left were two shiny scars."

I wanted to see her back, but I was afraid to ask. Maybe the scars have healed since, it's been long enough.

"They are still there," she said, as if seeing through my thoughts. "Though not as shiny any more."

A customer called from the front. An older woman in dark rimmed glasses. She wanted another drink and some fresh dumplings.

Camille B. took one last glance at the evening market before she walked away.

I ran into her ten years later. I was there with my family, buying brightly tacky mementoes at the market. Then I saw the café and remembered. We were hungry, so I took my family inside.

Nothing much changed. Dumplings and fresh juice, steaming coffee and hot chocolate with chili peppers. After we ate, I asked about Camille B. I was told she no longer worked here, but that she lived down the street, in a house with the lavender garden in the front.

I left my family at the café, lingering over their hot chocolates and ran down the street. The lavender scent hit me before I even saw the house.

Camille was home. She was out back, varnishing a table she painted. I did not know what to say to her, but I had to see her. We set under a linden tree and drank ice water. She smiled.

"I have lived an ordinary life. Without my wings, there's nothing special about me. So I do as I please."

She seemed happy. Free.

Edie Seashore: On Coaching

Interview of Edie Seashore by Dorothy Siminovitch

Edith Whitfield Seashore, M.A. passed away several years after this interview was conducted. Edie had more than fifty years of experience in training and consulting with governments and corporations in organizational development and behavior. She was a past president of the NTL Institute and served as faculty of the Johns Hopkins Fellows Program in Change Management. She was the co-founder of the American University/NTL Institute Master's Program in Organization Development and continued for many years as a faculty member in that program. She co-edited *The Promise of Diversity* as well as the book co-authored *What Did You Say? The Art of Giving and Receiving Feedback*. and *Triple Impact Coaching*.

Dorothy: Edie, I take the honor of interviewing you, with particular reference to the great Kurt Lewin who said that "there is nothing as practical as a good theory". Long before there was research on female leadership which pointed to the practicality of women in leadership, or academic studies of mastery in practice, or the concept of generativity applied to leadership, you have embodied all these concepts.

As President of NTL (National Training Laboratory), and a steward of OD field[1], you have seen the field evolve over these last fifty years. You have stood as a pillar of practice and mentored many leaders in the field of OD. You have also been witness and agent to the practice of coaching in the OD field and a pioneer in using "feedback" conceptually and practically to assist professional development of practitioners and executives. I say these large accomplishments to "set the ground" for our interview and formally ask: "From your perspective of the evolution in the applied behavioral sciences, where do you start with your understanding of coaching?

Edie: We didn't know that's what we were doing, but I would say that everything that my experience as a facilitator and even in the NTL group was in some sense a form of coaching.

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[1] OD stands for Organizational Development

I think that the fact that we were actually helping people to understand their own behavior in a group setting and the impact it had on a group was a curious form of coaching.

Mentoring and Coaching

Edie: I was a co-trainer at NTL for eight years, and I was being coached constantly by my "senior(s)", they were all older than me and more experienced than I was. They all had their PhDs in Applied Behavioral Science, and I just had my Bachelors and getting my Masters at the time. But, they were coaching me in how to become a more effective facilitator of key groups at the time and working in skill sessions. When I went out into the field, I went with Richard Beckhard Associates, and he was clearly my coach. He came in, you know, from the theater.

Dorothy: He came in from the theater.

Edie: He was the stage manager at New York City Theater. Some of the big shows in New York. And during World War II he was with USO around the world. That's how he met his wife. She was also with the USO. Richard came in through stage managing and setting up scenes. That's how NTL picked him up. They got very intrigued about the fact that he actually could help us stage manage some of the role plays that we were doing. Role playing was a big thing then. Also, some of the skill exercises that he would be--he understood the drama of it all.

His firm at that point was called "Conference Counselors". He was changing large conferences into working conferences rather than just lectures. Richard was the one who initiated the idea of putting in round tables. In New York City, the hotels had to go out and find round tables and bring them in for his conferences and turn them into working conferences where people actually worked together in small groups - unheard of in 1950. When I joined his firm in 1958, it was still Conference Counselors. While I was with him, we changed it over to Richard Beckhard Associates because he decided that he was no longer just going to do conferences. He was also going to do systemic change inside systems and see how the conferences would work into that.

So, my first few clients with him were really people who were changing their whole system--doing different kinds of conferences to work in the systems that he was introducing me to.

When I left his organization, I was going out into the field on my own. I was turning about 30 at that time, and the field was becoming OD. I counted on all of my previous people who have been working with me through the NTL process to get me into organizations and then to help me. So, I was constantly being coached by them.

I didn't ever think of calling it that, but as I began to work with my clients, they were the role model I had - those who had been working with me. So, I began to work with my clients in the same fashion as they had been--as I had been coached. I was beginning to coach my clients and work with them on what they were doing. A lot of what I did was in forming the relationship with the client. It was a collaborative relationship, so it was actually their system. I was coaching them on how to work more effectively in their system. So, when coaching came along as a formal field, all of us looked at each other and said, "They have taken a fraction or a piece of what we do as part of our whole practice and suddenly made it a certified field." I said, "We've been doing this all along. It's been part of our work--it's built into what we do. It's a natural part of what we do."

One of the things that astonished me about these early days was that people who were called "coaches" were doing it without any systems orientation. That is to say, they didn't have that as part of their repertoire—to put the person they were coaching in the systemic frame. And so, they were coaching them without ever having any knowledge of their--real knowledge of their organization that they were in, never having met the team.

My first reaction was one of astonishment that coaching could be done effectively. When I heard that some had clients whom they had never met except on the telephone and they were doing all the coaching of them over the telephone, I thought, wow, this is pretty interesting because all the coaching I ever had was in some kind of a context. All the coaching I ever did was in a systems context. So, how are they doing this coaching, even though it seemed to have worked?

Coaching was now a formalized system now—something that had just been an expectation we carried with us wherever we went as group trainers or group facilitators or as OD consultants. Our values as OD consultants were to some extent part of the coaching field, that is the values of collaborating with the client; building personal and systemic support systems; working off of sound and current data; engaging recipients in the change process;

contracting for continual feedback; working effectively with differences of all kinds, approaching situations with curiosity; intentional, conscious use of self; empowering myself and supporting others to empower themselves and thinking systemically.

Douglas McGregor [who wrote about theory X and theory Y] was [another one of my mentors], and he did a lot of informal coaching for me. Informal, I mean, we'd have dinner and talk. That was coaching.

Dorothy: Absolutely. The "coaching conversation" as the vehicle of dialogue, meaning-making and possibility.

Edie: Totally. And to these days I use some of those as my marching orders.
After that, Hal Kellner was another mentor when I went out in the field. Hal was a member of NTL. He and I did a lot of work together. But, he was way ahead of me in the way he was able to perceive what was going on. Cathy Royal and Fred Miller coached me about the critical role of diversity and inclusion in the world. My African American colleagues have taught me so much. They have coached me. "Oh, my God, Edie, how could you possibly have done that?" And to this day—just a month ago—I had a whole day with one of these colleagues. She and I were trying to write an article about the way that white women and women of color, or really African Americans, see the world that gets us into trouble rather than collaborating elaboratively. An incident came up that was very critical back in the mid-80s, when my colleague and I were working together. She offered me an insight. If I'd had this insight during the mid-80s my history would have been in a different place I think.

Dorothy: And what was that insight?

Edie: She said something very interesting. She said, "I always observed that all of the African American women you were mentoring often stayed at your house." Then she named off about 10. She was dead right about all that. And she said, "And I was one of them." I said, "That's true." And she said, "So, you go from mentoring to a colleague, from mentee to a colleague to a coworker to a co-leader, and then in the end, Edie, you own the store."

Dorothy: What does that mean?

Edie: That means that I can pull that trump card anytime I want.

Dorothy: Which means?

Edie: I'm a white woman. I'm white. It's my world. And I'm going to make sure that I still have this shop. I'll be a good person, very good person, empathetic, colleague, understanding, everything, but if I need to be, I will do something that will remind you whose store this is. From their point of view, having been socialized to know that, from our point of view, having not been socialized to know that, I don't know when I'm pulling that—I don't know when I'm doing that. I do now. It'll make a big difference.

Dorothy: So, it is provocative to hold you as accountable for an entitlement process that you are not even fully choosing yet, that is the existential paradox, we are born into these dynamics and then we *can* become accountable. And, now that you see this, from your perspective, what could the provocative question have been?

Edie: The question I had to ask her was, "Why didn't you bring that up then and let me have the benefit of your seeing something that I wasn't so that we could have talked about this?" She says, "I don't know. I wish I knew." I, Edie, didn't have that much power or that much courage. You know, --she's an ENTJ[2] like I am. We can look like we're much more powerful than we often are.

Dorothy: Well, of course and "looking powerful" can also keep people from asking the question that break open the conversation, even for you as a pioneer, to reflect on where you did not ask the questions that mattered..

Edie: That's a good question because it would have made a big difference. She may have thought I wouldn't even have understood it then, which I understand it now. I'm not so sure I would have. I think I would have. I do believe I would have. But, at least I would have been curious enough to find out what was going on but in a different way.

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[2] Myers Briggs Type "ENTJ"

Dorothy: What I think is so interesting is this is where the power truly is of coaching others for their own voices. That's moving beyond mentorship. That was the coaching question. "Why didn't you bring that up then and let me have the benefit of your seeing something that I wasn't so that we could have talked about this?" And it's not your answer, it's not my answer, but it is the question that would have evoked her voice and that voice, the voice of a gifted African American professional was so critical back in the 1980s and most certainly, that voice is so important today.

Edie: I know. And it's a question I can ask, but answering it in retrospect is not easy. Answering it 20, 30 years later.

Dorothy: Well, it's a painful one to answer, "how did you stop yourself from asking the bold and needed question when it mattered" in retrospect because you paid for that with 20 or 30 years of "not having asked it". And, asking the question that evokes an answer that has not been heard, is what opens up new perspectives and therefore, new possibilities.

Edie: Exactly.

Dorothy: That's actually the painful one, and I say that to you with my own regrets for self and certainly for others. Discipline is required to develop the strength of self to ask the bold questions just at that moment when the status quo makes the bold question risky. It is core to what "good" coaching requires. To not ask relevant but bold questions at the time that matters is remembered as opportunity that was lost, status quo continued which maintains what needed to be released. Any of us remember those lost moments with regret.

Paradoxically, regret reconsidered allows for wisdom and new possibilities. It is in this "seeing" possibility that new perspectives offer themselves that enlarge our ground for future actions. This is why longevity in the field is so critical, that we learn and inspire new possibilities. And, your work in supporting diversity speaks to that. Your willingness to share those moments of missed opportunity, serves to inspire others to what can be acted upon.

OD and Coaching: The Early Years

Edie: My first "work" was with the rabbis - the Hebrew Congregation of America. I was sent in to these rabbis by Dick Beckhard because he got a better offer to go to Hawaii with the Young Presidents organization and begin to work with them. So, he said, "Edie, you take this." And I walked in there. I thought they'd drop dead. It was all men, and they just didn't expect to see me.

Dorothy: So, when we talk about using one's presence in the role of being a coach, you were really standing at the very beginning of where that was getting identified?

Edie: In this case my client was the chief rabbi who was in charge of the organization that was running this conference. I was constantly coaching him on how he could work with the people that were running the conference and coaching him on things that he could say that would help facilitate it and make it inclusive. I didn't consider it "coaching." It was obviously part of my assignment. If he was going to be effective, he needed this kind of help.

Dorothy: So, Edie, standing at the beginning and looking at the trajectory to now where we have words like: "it's a learning engagement", "it's collaboration", "it's entering into an agreement about what's your vision."

Edie: Contracting, yeah.

Dorothy: Contracting. So, how do you define OD and its relationship to coaching from then even to now?

Edie: Well, I think OD was always considered a systemic intervention, and coaching may or may not have been.

Dorothy: When coaching wasn't looked at systemically, where was it valuable and where was it limited?

Edie: When we did coaching, it was part of the intervention, the systemic intervention. When I began to see it being done without any awareness or any concern for the larger system, I realized that it had shifted. I saw, in the 80s, when people started calling it "coaching" and putting the classes together and having the certificates.

Dorothy: Programs really started in '96. That's when there started to be something called coach training programs. And some people say they started offering things in the '90s. There's a lot of different ways of looking at that. But, as I listen to you, you weren't even calling it coaching. So, what was the thing that you weren't calling coaching, but were seeing it as a subset of OD?

Edie: Helping the client to use themselves more effectively is one of the ways. And using themselves more effectively in whatever role they were in.

When I go back to where I think I was being coached, I was being coached as a assistant co-trainer. I was called a co-trainer, which meant I was not the trainer of the group, but I was working with the trainer. I was being coached in my ability to work with a T-group from the very beginning. I was being coached every year after that under a different person.

Dorothy: Edie, you are now identifying how coaching can be used in the training and development experience. Who are the people that you identify as your coaches? One of them you said is Richard Beckhard.

Edie: Right. Well, certainly, Jack Glidewell. Glidewell was the person who said to me, "Edie, you are now fully trained. Do not return as a co-trainer ever again to the Bethel campus. Wait till they ask you back and give you your own group." This was after eight years of training.

That was a big leap. He was coaching me through that summer, and he could see that that we could call off this "co" stuff.

Dorothy: What was his claim--his particular expertise?

Edie: He was a social psychologist. He was brilliant, absolutely brilliant. And he wrote a wonderful book called *Choice Points*. Yes, called when to fight and when to walk away [with choice].

Coaching and Choice

Dorothy: Your particular gift that I see you giving in your OD and coaching work is to remind people that they are always at choice which now I also trace back to your work with Glidewell.

Edie: Yeah.

Dorothy: Could you speak to that in relation to how that is maybe a defining characteristic of coaching?

Edie: Absolutely. I think that one of the things a lot of people have given away is their control of their own behavior and of their own destiny. They think other people are to be blamed for what's happening to them. Also, they're not aware of how often they are still working on belief systems that were built into them at a time in which they really didn't know they had choices because they built it into them by society or by those who were guiding them, family or whatever.

These belief systems are what make us very often respond to things automatically rather than stopping to take a look and asking: "is this really a choice that will help me to go in the direction I would like to go in, and is it working for me still?" Recognizing that this is something that was actually built in at a time when we weren't able to choose whether to accept it or not, and now we can. Now we can take a look at some of those belief systems and get rid of them, build a new one in. We're always operating off some kind of a belief system.

For instance, when the women's movement came in, when a lot of the movements came in, I think they began to alter a lot of our belief systems and our automatic responses to what we thought society had built into us, such as women are supposed to be seen and not heard. Well, whose idea was that anyway? So, given a choice, would that work for us, or would we rather have a different belief system? We had to do a lot of those. Some people still have to

do a lot of those because they didn't realize yet that they can or should or could do these. I think that choice gives us a way to define ourselves to make the kind of impact that we want to make to be clearer on our intentions and to be in control of our own destiny.

Dorothy: Edie, such a large part of coaching is creating a space for reflection.

Edie: Exactly.

Dorothy: As I listen to you, it's interesting to see how embedded this is in your phenomenological use of yourself, where this is so in your skin that you do this. It's interesting to even hear that there was John Glidewell who made choice points a famous concept and how you took this into the repertoire of your wisdom and delivery. And it is very much part of assisting people to heighten their awareness to look at how they, with awareness, can choose something different. That's now part of the ICF competencies.

Edie: Exactly.

Dewey, Lewin and Adult Learning

Edie: Incidentally, I also was very fortunate in another sense. I think my family had a reflective aspect. Not my father, but my mother. My father was just right out there, being an extrovert and all that. But, my mother could sort of reflect even what my father was doing, which is kind of interesting.

I made choices back when people thought that was just a bratty thing to do. I would not go to the colleges that everybody wanted me to go to because I had a college in my head, which I had never heard of—that I wanted to either put together or find somewhere on earth. And, of course, Antioch, weird and wonderful, sold to me just as I was going out of my mind trying to figure out how to get to some place that made sense. That was exactly what I had in my head, and I'd never heard of it in my life.

Something was going on with me. I had an education that was very unusual for a lot of people back in those days. I went to a John Dewey school. And John Dewey I do believe understood the whole notion of choice and collaborative learning. I mean, that was his thing. So, I started out for the first nine years of my life in a John Dewey school. I didn't

know that that's what it was then, but it was a small, country day school. But, it was based on John Dewey. And then I went to Antioch.

Furthermore, I landed in New York at a time in which therapy was the biggest thing for young people. It was almost more important than dating. Everybody was in therapy. So, I went into thinking "what the hell." So, I had a very good therapist.

Dorothy: What was it about those times? If those times were about therapy and these times might be about coaching, what's the difference that would call for therapy then and might be coaching now?

Edie: Well, I don't know whether the times did it so much—the times obviously produced the people, but we had the people who were doing it. That was the times in which we were just getting over Freud and Jung. I mean, Jung was still very present. And all these guys were running around – including Kurt Lewin. These guys who had the therapeutic concept of getting to the unconscious and helping us to free ourselves for more conscious choices. I think there's a major difference between therapy and coaching in the sense that I do think therapy still works largely with things that are out of our consciousness, whereas that's not as true of coaching.

Dorothy: Edie, it's so interesting because you actually assist in the Kurt Lewin Center. If you think about Kurt Lewin in relation to coaching, how could you see his influence both on OD, and what would you want incoming people who want to learn and apply themselves in coaching to know about Kurt Lewin and his impact on coaching?

Edie: Lewin was the base for those of us at NTL—the "Father" of it all. Adult learning came along just at that time, too, Malcolm Knowles. Incidentally, my husband, Charles, just became the Fielding Graduate University's first chair. It's the Malcolm S. Knowles Chair in Adult Learning. Charles has it for three years.

Dorothy: Wonderful. Charles is your partner in innovation in the applied behavioral sciences and considered the father of how to use feedback in adult learning. And, a few thoughts from you on adult learning in relation to coaching.

Edie: Adult learning was a whole new concept at that time—the concept that we could actually teach adults differently than we taught children, that they learn differently, and that they could continue to learn for the rest of their lives. The belief that you can't teach old dogs new tricks was no longer something to hang onto.

I think therapy and all these other activities support your notion of awareness. That is to say, self-awareness was a big beginning. Group awareness was next. Lewin brought the group awareness. Lewin's basic formula is that behavior is the function of people in their environment. Behavior isn't just random. It is actually based on the relationship between a person and their environment. Feedback is part of the way we get information to stay on target in our environment. Lewin brought feedback in as an idea, and feedback is certainly one of the baselines of coaching.

Feedback and Coaching

Dorothy: Could you speak to that, Edie, because people think they know so much about feedback. You're one of the authorities regarding feedback. People often talk about feedback without even understanding that they're not giving feedback.

Edie: Exactly. People think that feedback is a change tool. It could result in change, but that's only the choice of a recipient. The actual tool itself is only an information tool. And the information has to come from somewhere. This is where I think a lot of people are confused. Is there a reality out there or is it all perception. In the case of feedback, it is a perception, not a reality. You're getting the information of someone's perception. And that goes through their own system.

So, when I hear feedback, I have to keep in mind that this is based on their belief system, on the "me" that they carry inside themselves, not on me. They don't know me. They only know their experience of me, which I'm finding out, and also their belief systems about their experience of me. And that's what I'm hearing.

If I can understand that, then I can decide if their information is important to me in order to keep me on target for what I want to do and to be related to them. Is this very important information to me? If it isn't, then it's irrelevant information to me.

Dorothy: In terms of someone who wants to hang up the shingle of coaching or even the shingle of OD-what's the development need that you see for practitioners in relation to being able to use themselves as an instrument, knowing that feedback is colored by your perception, which is about your beliefs?

Edie: I think they have to be very clear what those are. They have to reflect on their choice of feedback, for instance as a coach—whether they're giving feedback that will actually in any way make any sense or be useful to the person who's receiving the feedback. First of all, they have to find out what would be useful to this person. Giving feedback without having any clarity about on what the recipient would like feedback—this is sort of a shot in the dark. You're not giving it necessarily because of a request from the coachee. You're giving it as something that is your choice, and maybe it's not even relevant feedback. Often we give feedback for some reason, for ourselves, with no relevance to the person who's supposedly the target of our feedback.

I think, first of all, coaches have to have a different frame on feedback than most people seem to have. Secondly, I think that people need to have an awareness of themselves so that they can get in touch with their perception and see how colored their perceptions may or may not be by their belief systems. Then when they give feedback, they be clear that this is where it's coming from and expect the person can take it or leave it. While we're at it, there is considerable confusion around some of the tests that are given about how people see other people. The source of the feedback from these tests is anonymous—but you don't know from whose point of view you're getting the information. I think there is only one way that you can possibly see whether it makes any sense to you or no; you must be able to have somebody help you see it at the time when it's occurring so that you can experience it.

If somebody says one of the problems is that I talk too much and don't know when to stop, just hearing that isn't going to help me. But, if I can say show it to me at a time in which I'm actually doing it, then I can understand what it is that other people are seeing. For some people it may be too much, and for some people it may not be enough. But, at least I'll know what the behavior was that had this response. So, anonymous feedback, I think, is confusing to put it mildly. Also, feedback out of context, that is to say, when you can't have a clear example that you are conscious of experiencing, then I think it's abstract.

Dorothy: In terms of your perspective where feedback is used frequently as a tool of development. What's not really acknowledged is that it depends on whose feedback it is.

Edie: Yeah, exactly. It's not really information until you have the context.

Dorothy: Looking at how 360s are now used in organizations. They're used as the platform to begin so many coaching assignments.

Edie: I know it. And when it first came out, I went down to the Center for Creative Leadership and talked to the head guy. At the time, I was president of NTL, so this was in the 80s. And—no, it was in the 70s. They were delighted to host me down there and were very cordial about hearing my perception of their 360, which was not very friendly. I told them I thought it could be used more effectively. I didn't think it should be abandoned. And I made some suggestions about the "OD way of using it" I said, for one thing, if the trust in organizations isn't high enough for people to actually sit down and talk with one another, then at least let them sit down with a group of people from the same category from which they're getting the results. So, if they're getting them from peers, let's sit down with some peers. Even if it's a facilitated discussion, let them ask questions of the peers around what it is that the feedback was about so they understand it. Ask help from the peers to point out to them when they're doing this, so that they can experience it, because there's many a slip between what they hear and what they can actually see themselves doing.

Our best experiences are people catching themselves in the act. Then they say, "Oh, my God. This is what it is. This is what I feel like. This is what I'm thinking, and this is why I'm doing this."

Dorothy: Which is really what happens in group work.

Edie: Yes. That was what the T-group was based on to a great extent. The feedback was in the here and now. That was the idea. And feedback in the here and now is still the most effective feedback, but if they're going to do these 360s anyway, at least get the collaboration of the people who are giving them feedback. It may not be the exact person, but it's at least the category. In other words, if they're hearing something from their peers, then let them get together with the peers and say, "Let me understand this and let me ask you, will you please

point out to me when I'm doing this so that I can experience what it is you're—what's happening at the time?" Which was the basis of the T-group.

Incidentally, I have a colleague right now who has an enormous consulting project with one of the international pharmaceutical companies. He's having the time of his life, but he consults to all the head people, following them around five days a month everywhere they go and giving them instant feedback. Everybody seems to be loving it—but the paradigm of feedback really should be changed from giving to requesting or asking, because I will ask people for the information I need. Then we've got something really going for us.

My colleague got the brilliant idea that this was going to be the best approach in this particular situation. He has a very receptive client for the first time in many years who said, "You tell me how this is gonna make a difference. What's the best way for us to go about this?" And my colleague said, "Let's give this a shot. I think this is gonna make the biggest difference." Make it transparent—they'll understand what feedback is. They'll understand their behavior better, and other people will be observing this. Let's see if we can get the biggest bang for our buck. So, he got his consultants that he thought could do this, and the consultants are beside themselves with glee, and the clients are loving it. That's what I mean by the part where coaching was confusing to me early on because it was being done out of a context. This way, they see the person in their systems. They can make it a systemic intervention. That's OD.

Dorothy: So, what you're really saying is-is that coaching within organizations is too often not built into the actual context. And not built into a process for actively being able to hear verification or illustration of the points being made?
Edie: --Not only hear it but also see it.

Dorothy: Also, if the feedback given is not in relation to a request the recipient is making, then the recipient will not have the context or actual data for the feedback given, so "that" feedback from others doesn't actually connect with the recipient. The learning opportunity will be missed. The feedback doesn't connect or "land" with the recipient.

Edie: I think the chances of it landing more often and more effectively would be better if the feedback process would shift to people seeking out the information because they'd like to

know whether they're really on target, and if not, where are they off. Even then, recognizing that it may not be all of them either. It is the way they're being perceived that's making the difference.

Coaching and OD Values

Dorothy: Edie, in a way you are suggesting that if coaching is going to be really more powerful and legitimized, then the values of OD are important for coaching?

Edie: I've always thought so, but I have to admit coaching is quite successful without incorporating these values.

I don't go around preaching this because it's a little bit ridiculous, but I'm impressed—I'm enormously impressed at the extraordinary hold the coaching community has in the world. Perhaps it's a substitute for what therapy was in the 50s. That's an idea I hadn't thought of until you asked the question. It may be the watered-down version of therapy.

Dorothy: Or the liberated version of therapy.

Edie: Or liberated, exactly.

Dorothy: Without having to be a Ph.D. in clinical psychology and it can be a collaborative experience. James Hillman famously said "that we've had a 100 years of therapy" but the world isn't getting any better. Coaching has grabbed the professional zeitgeist because it urgently calls for learning, but, there might be a shift in the values inherent in coaching—so could you articulate what you see as the values that would really enrich coaching?

Edie: Certainly, the concept of systems. That is, it is important for a coach to be familiar with the context in which the coachee is asking for coaching. That's one thing. And not just to see it through their eyes, but also to be able to experience it in other ways. The other value is to be more in tune with the actual experiential part of the work—that is to be clearer about the" here and now data". Rather than the experience being filtered through other people's filter systems or even the coachee's filter system, the coachee would actually understand it at the time that it's experienced. It would be much more of a contract between the coach and the coachee on seeing them in different settings, of helping them to figure out a way where

they could continue to get themselves the kind of coaching that they need through feedback and not just relying on relaying it to somebody and then getting information.

For instance, when I was coaching the Colonel, at Walter Reed, I worked with her governing team and saw her there. I also observed her in other settings and was able to coach her regarding not just the things on which she needs help; in addition, I could offer things I've watched her do. Things I have been able to observe about her. I've gotten her to this point-- although she was the most easy to work with client I've ever had. She got so turned on by the idea that she could get her own information. She wouldn't have to rely on somebody. So, for her, she got to asking people, "How did this interview go? Tell me what happened? What was it like for you? And how did this meeting go?" She got caught onto the "check ins and check outs" faster than anybody I know.

So, all of these things are part of what helps a person get information that will make a difference in the way they work and in the way the organization works.

Dorothy: So, raising awareness is one of the key things?

Edie: It's raising awareness in an experiential way, not just from information, not just from tests.

Dorothy: So, Edie, raising awareness in the here and now really helps people break through their unconscious trance where they can choose.

Edie: Exactly. And helping them to be more reflective regarding the influences of the past on them, particularly the past into which they were socialized or inherited, not just the past few months, but where did that come from?

When someone says, "I was terribly, terribly upset by what happened," the question is that was an automatic upset. I'm always upset when that happens. Is there any way of not just accepting that, but asking yourself, "Is there any way I can look back on my life and think of a place in which I might have been programmed to be upset when that happened, which I now no longer need to continue?"

Dorothy: What you're saying is that the influences of the past are kind of a safe way of offering a deep intrapsychic question on which you are helping people reflect. It's kind of a mini version of therapy.

Edie: It is. Exactly. The only difference that I can see is that we're asking them to look at stuff that is enough within their consciousness so that they can get it. Whereas, I think a lot of therapy was based on getting stuff that is no longer really available--not as available to us, so we can't get it until we get some rearranging of things to do it.

Dorothy: And that actually is one of the core parts of modern day coaching. What can you access that you can then act on?

Edie: Exactly. That's good. But, we still don't have a chance to help them see whether they are doing it. They may actually be able to see it. Everybody can talk about doing it and have some verification that that is, in fact, what they've done. Even in NTL we didn't have that. We would have people up here for three weeks in a T-group, and their behavior would change dramatically in many ways during that time in that system. They'd go back into the old system where they couldn't hold onto this behavior. So they lost it in that system or they got the hell out of that system. They left. A lot of people left.

Also, one of the things we found out in some of the research was that there was a distinct difference between a person's internal sense that things had changed and people experiencing those that had changed. Matt Miles did a wonderful study on managers who had gone to NTL for their three-week training program, three-week T-group. They came back feeling that they were very different and they could tell you all these things that they thought they were so different about. Then the researchers asked the people whom they were working with and these people didn't see that at all. What do you mean he's different? Don't kid me.

Dorothy: So, their internal experience was different, but nothing really changed?

Edie: Changed with their behavior according to their colleagues.

Now, at that time, we weren't very clear about feedback. The truth is that it's possible they actually had changed, but their colleagues' perceptions were very strong. These perceptions hadn't changed. They were still seeing them do things that they weren't necessarily doing.

Dorothy: We call these "frozen gestalts" — that is seeing the same picture of things and the perception stays "constant" so the meaning does not change.

Edie: Exactly. I didn't write on feedback until our book, *What Did You Say? The Art of Giving and Receiving Feedback*. came out in 1992. It was totally different than anything that was going on in feedback then and now to a great extent. So, a lot of this stuff was evolving even for us. We thought we had a lot of things going for us, but we didn't have — we were learning, learning, learning, learning, learning. And as you say, coaching could be just an evolution from what was considered difficult to get to being able to help people get to it in much easier ways today.

It didn't occur to people that they could figure these things out. So they went into therapy to find out what was wrong with them. It's possible that none of that was necessary if we could have had the kind of opportunities that people have today in less dramatic settings than therapy. I mean, when Carl Rogers started on the West Coast, his groups were almost all feedback groups and reflective groups. NTL was not that. NTL was people in a context. What was the group like? What was going on in the group?

Dorothy: You know, Edie, today there is a big movement to include team coaching.

Edie: Yes, big. So, we're going back to the group again.

Dorothy: It looks like this movement is really verifying everything that you're saying — that is it is a mistake to coach people without really looking at the impact people are making on others or creating a context where they can actively get feedback. Right?

Edie: Right.

Dorothy: And that's a place for them to really have the big learning shifts of seeing oneself in relation to inner experiences, feedback from others in the moment that is available to co-inquiry and exploration of what is being influenced by the context.

The Opportunity for Learning

Dorothy: Could you speak about how you now describe real learning possibilities or what you think about that in relation to coaching opportunities? If change really requires learning, what's the relationship?

Edie: Well, there's no question that coaching is learning. I mean, we need to include recognizing and understanding the environmental, the systemic aspects of it. That is to say, not just to think that what's going on in the setting has anything to do with me alone. It has to do with me because of the context I'm in. And put me in another context, and I might be doing something else.

So, I have to understand the context better than I do in many cases, be much more aware of the system. My relationships with other people also changes depending on the context. We certainly know that this is true. People say I'm not the same person at home as I am in work. Well, there has to be a reason for that.

So, the question is: in a group setting, why do we take a look at the person without looking at the context they're in and seeing if they understand what's going on in that context. Understanding that this is why they're behaving as they are. And do they have the ability themselves to behave with awareness of the system that they're in? Or, do they simply behave because something is a catalyst to them and that's the way they behave without any consciousness or the awareness? I don't think most people do, but I think that the question is: how conscious are they that that's what they're doing? If two people aren't getting along in a group, for instance, the question is: what's going on in that group that's making it difficult for these two people to get along? Is it just the two people or is the group in some way a valuable thing to understand as well? Do you see what I'm trying to say?

Dorothy: Absolutely. There are answers in the context. Helping people understand the influences of their past, helping people get in touch with past filters just so that they can be more actively choosing or aware of that they can choose. That they're not the person of their

parents' era or their school system or whatever that was. Then to really look at the context and get some more awareness about that, and particularly within organizations that have so little time for reflection.

What kind of secrets did you find that could engage people in wanting to do that—because there is such a resistance against that?

Edie: I know. And it's so interesting because everybody loves the stuff that keeps coming out, but they don't know what to do--how to make it--to build it in. I mean, they love emotional intelligence, right?

Dorothy: Right, the love the theory of emotional intelligence, but in practice…

Edie: They go, "wow, this is it. You can't have a leader without it". And then they don't figure out how to get it from loving it, and when they read the book to getting their leaders to have it or to be more aware of it. I mean, we're missing that translation.

And everybody hates groups, right? I mean, meetings. Meeting after meeting, another meeting. Oh, my God, we go to lousy meetings, without stopping to think, is there any mechanism by which we could actually ourselves reflect on what could make this meeting better and be the people to choose to make it better? Not wait until some magical formula comes down the pike or the leader is responsible for the lousy meeting. Does this work for you is the question. If it isn't working for us, why do we persist on doing it? Why don't we become accountable for saying we can make a difference if we just simply stop and use some of the wisdom that we have within us.

So, why is it so hard to do? People say, "I don't have time to spend the last 10 minutes of a meeting talking about how this could have been more effective or what we'd like to do next time to make it more effective. I don't have time for that." So, they'd rather go back to another lousy meeting.

It's almost like the health field to me. I know it isn't good for me to eat bacon, but it's here and I love it so that's too bad. I'm eating it anyway. That's our question: why have we chosen to persist doing things that we know aren't working for us? In the interest of what?

How do we change bad habits even if our whole organization has a bad habit? It's very hard to do. The best thing I've experienced is when people actually can stay with it long enough to experience it and see the difference.

The "Triple Impact" Program

Dorothy: How have you found the way of keeping people engaged?

Edie: It's not easy. The thing that I would do with my "triple impact" programs is we meet once a month approximately for a day. We have an online, interactive thing going in between. Our clients have the constant opportunity to call us and be coached about something they're doing and then letting us know how it happened and what they need to do differently and all that. We try to build in as many support systems as we possibly can to help us go from a concept to a change of behavior, change a way of thinking. As a person in one of our groups says, "It's a cosmic shift."

And I think what we're doing is a cosmic shift. We're asking people to accept stuff that in many ways is countercultural to a lot of things that are going on today: we don't have time, we're too busy, all these kinds of things. We're asking people to say no, no, a few moments of taking a deep breath and saying, what is my choice in this? How could I become accountable for what I do, not continue to blame somebody else for what they're doing for me? What do I want and what can I do to get it? To take those few minutes could make a lifetime of difference. But, how do we get people from here to there? That is not easy.

The triple impact concept is so important to me that in the programs that I do I really say to them: learn this in such a way that you become transparent about it so that other people can begin to understand it and learn it because we can't seem to figure out any other way of doing it. I'm sort of counting on you that you're taking these programs to be a conduit, and not to teach them but to help people live them by your living them transparently.

Dorothy: What seems to be a very enduring resistance across the last number of years is that it is counterculture to take the time for these things that really make a difference in terms of learning and, therefore, change. That is being reflective, using your physical self, literally breathing to have a different perspective, asking and receiving feedback so that you can be reflective about new possibilities for action.

Edie: Information that will help you continue.

Dorothy: Right. Getting information that will help you, looking at what choices you do have, right?

Edie: Looking always for the choice that you have because if you take that choice notion seriously, under all conditions people have choices.

Dorothy: It's interesting. I see a relationship between the ROI for yourself, for the organization, for the environment, right?

Edie: Right.

Dorothy: And your triple impact is: these are the concepts, then I coach you, and then you coach others.

Edie: Exactly. And they coach others. It doesn't stop there. Bev Patwell, who wrote the book with me, her triple impact notion is the individual helps the group, and the group impacts the organization. That's her triple impact. She talks about how she's done that in several Canadian companies.

Dorothy: Maybe that's a very good ending point just for now. Edie, you are suggesting a "coaching universal" within organizations. We coach the individual and then we can coach the group, but the group, from an OD perspective, has always been seen as the mechanism of organizations, right?

Edie: It's the fractal, yeah. It's the fractal of an organization. Most things get done in groups.

Dorothy: Most things get done in group, and yet coaching can very often start with the leader and then go to the group that acts as the fractal power of the organization.

Edie: Yeah, yeah.

Dorothy: So, Edie, the dance between coaching and OD is becoming more obvious.

Conclusions

Dorothy: What you're saying is that bridging coaching to OD values actually serves to evolve coaching.

Edie: Yeah, I think so, too.

Dorothy: So, you should have a smile on your face.

Edie: Yes, because I think a lot of people are recognizing that coaching needs these values in order to be effective.

Dorothy: Maybe we should trust the process inherent in learning. If we trust the process and the values are good, then we're going to end up saying- wait a second here, we have these common set of values that support the learning and change experience. Isn't it interesting that Peter Block, a noted voice in the world of organizational consultation, was an ODN [Organization Development Network] and ICF [International Coach Federation] conference keynoter for 2009.

Edie: Yeah. I know it.

Dorothy: So, I say to myself: "Which conference is this? OD at ODN conference? Or is it coaching ICF? Where are we and what are we?"

Edie: And Ed Schein wrote something about this in his book called *Helping.*

Dorothy: That's right. Otto Scharmer calls his book on helping one of the essential coaching books now.

Edie: It could drive you crazy actually. All those pages on helping — it's amazing.

Dorothy: Edie, you are a noted voice in placing feedback as the core event in coaching and OD where new learning can happen. You and Charlie have worked to teach and remind professionals about the development work that is required to know how to identify and use feedback choicefully. You have made the almost intangible concept of "use of self as instrument" the choiceful outcome of learning and development. Knowing how to use oneself effectively as an instrument of learning is key to coaches and consultants. This is one of the great gifts that you and Charlie really worked on to make practical for others.

Additionally your new work on triple impact coaching suggests that coaching across levels of the human system can also take on momentum that consultants assist in OD projects. Despite my seeing you as a pioneer in the applied behavioral science, a role identified in *The Age of Heretics* by Art Kleiner, I am always inspired by your effervescent love of learning and the human condition. A deep thank you.

Edie: Wonderful. And thank you.

Energy as A Way of Life:
A Personal Journey

Charles E. Smith Ph.D.

This is my personal journey, how I came from seeing organizations as static objects, to seeing them as interacting energy fields. It began six years ago, when I was the owner of a 16-person organization development and training firm. We helped companies with strategic visioning, culture change projects, coaching programs, and project effectiveness. I built the business from a $25.00 a day practice in 1969 to over $2.5 million in annual revenues in 1993, with the promise of continued doubling in growth.

I didn't sleep very well during those years. My company had several very talented, star-quality people whose view of what the business should be doing was not the same as mine. I would sell something for one million dollars, design it, do the first piece of work, and it would be very successful in my own terms. Then others would take over, supposedly to extend what had been started and bring it to fulfillment throughout a client company. But that isn't what happened. My intention was that everything we did would be brilliant, meaning that clients would come away from working with us cooperating and working together toward the same future. And while a lot of what went on was great, it did not meet my own standards of brilliance. Some clients were very satisfied; others were satisfied some of the time. But the experience over time was too harsh and divisive for me.

I had also hired people to run the company that had their own agenda and actually undermined my relationships with many of the key employees. They wanted to turn it into the kind of company they wanted, rather than what I wanted. So, the company was going in many different directions and there were lots of disputes and talking behind people's backs. I became increasingly deflated and didn't have either the presence of mind or the courage to make a radical change, to take the bull by the horns and make it into something that I really wanted.

As my energy and inspiration waned, the company was still successful, but became less and less effective. I was the leader and without my inspiration, many things began to fall apart.

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I began to get the idea that companies and people succeed when they have a lot of energy, assuming they know what they are doing, have talent, and have a good product or service to sell. And they began to fail when they ran out of energy. At the time, this wasn't a clearly articulated thought, but a background awareness that things were good when you felt great, when your personal and team spirit was strong, and things didn't work so well when team spirit and personal energy was down.

I was lucky at that time to meet a Native American Indian medicine man, Lorin Smith, on the Pomo Reservation in northern California. He was a short, balding, chubby fellow, with a very pleasant expression on his face and very soft-spoken manner. I met him in a "round house," an enormous round building that he had built to do his work as the tribal healer. I had no idea what that meant. I thought it had some remote association with medical doctors.

I spent about two hours with him and asked questions. He talked about how hard it was to be a healer, how a healer heals himself or herself first, and that life really was all about energy. Life was all about maintaining, preserving, and increasing the energy you have. Life was all about gaining access to the infinite amount of energy that was available from the sun and the moon and the water and the stars and the wind and the earth. And that was what was most missing and most needed in the world – an improved relationship to one's own energy and to the energy of others. He told me his people call this energy by the name of "Weya", and I found that Weya was pretty hard to define. It was everywhere. It was contained in all living and inanimate things. It seemed to have a spiritual quality, and he and his people sang songs about it and were always attending to their relationship with Weya, with energy. He taught that when one was in harmony with the energy, life worked.

And when one ignored the energy, life didn't work. I didn't begin to understand what he was saying or where he was really coming from. But I knew, both from his words and the calm way he was being about it, that he was representing something I had not seen before: that living in a world in which my harmonious relationship with my own energy and the energy of others was possible. I saw that healing was getting energy to be where it was missing and needed. Lorin Smith had developed his own healing practice based on massage, singing, dance, telling stories. As I came to know him over time, I saw he could

look at a person, individual, or look at a group, and see exactly what kind of energy was missing. He could see where the joy was missing, or where the relationship was missing.

He could see whether people didn't mean what they said. He could see how their bodies were contracted or turned against themselves or twisted out of shape. He had an ability to see what I was not trained to see. I could already sense some of this in my work with groups, but I was not really construing it in any kind of energetic framework as he did. And what he was able to produce, in terms of sick people getting better or groups going from non-directed to focused, was very fast and remarkable. It was as though he was breathing life – breathing energy – into them. And he would do whatever he needed to do, whatever he could think of to do, given his particular talent, culture, and repertoire.

I came back to my company and said, "What's missing here is harmony. What's missing here is people going in the same direction. What's missing here is alignment. What's missing here is focus". I started talking to people about being aligned, about really being on the same page about what we were doing and the methods we were using, and the focus of the company. I told them I had come to a place where I was no longer going to put up with a company that was not aligned, and I meant it. It was a dedicated, heartfelt statement. And in the next months, half of the people left the company or I fired them. Those who left didn't really want to align with me. My commitment to increasing my own energy and the energy of the company seemed to be the cause of many people's departure.

It was my own lack of energy, my own burnout, and my own unwillingness to put up with that situation that caused me to sell the company and move with my family away from Washington, D.C. to the vast, empty desert of northern New Mexico. During this transition, there really was a contextual shift in my life. There was a shift in framework from hard-hitting, "Let's get it done, let's make the money, let's get as big as we can," to something that Lorin Smith had represented -- a world in which the expansion of energy was the senior commitment. And with it came a new sense of hope, a new possibility.

In the desert, it is easy to see the world in energetic terms. Someone wrote that, "every new word begins in the desert" – that vast, empty place where all creation happens. There is nothing between you and the world. I've since come to think that, for the most part, the wilderness is the real world and that what people have constructed isn't the real world.

What if the real world was the sky, the wind, the trees, the water and the land? It was as though somebody had taken a vacuum cleaner to my mind and opened up my heart.   My whole self and being filled the place. I felt so alive, with the high plains desert and the mountains, the pinon pine and the stars at night that stretch in a 360 degree horizon and shine bright in the crystal clear air. I had a continuing experience of having no barriers in between me and the real world. And I referred that experience back to most of the companies I've been in, where that kind of aliveness, energy and vitality was rare. I'd see it once in awhile in a hot project, a great relationship, or an exciting startup. But for the most part, the more organized a group was, the deader it was, the more people looked like zombies and developed these incredible rationalizations for how their lives were and how they worked.

What was so present in the desert was the opposite of this deadness – it was simple energy and lightness. For four years now, I've been going back and forth between this wilderness and the work I do consulting to companies. And I continue to be amazed that the energy that's available in the wilderness is so absent in organized, corporate life. At the same time, however, some of the best that has been created through technology and productivity is missing in the wilderness. It's not just a one-way street and I'm not speaking at all against the best of modern life. What I'm speaking against is anything that drains energy, anything that takes vitality away.

During the second year in my transition from a static world to an energetic-based point of view, I took a training program with a Mexican teacher, Victor Sanchez, who had studied and lived with the Toltec Indians in northern Mexico. Victor had developed a coherent conceptual framework that was very much based on energy. Lorin Smith didn't have a lot of explanation for what he did. He just did it, and I saw that he was working with fundamental energies. Victor Sanchez, in contrast, was a scholar as well as a teacher.   He said that the Toltec Indians believed that the world does not consist of objects. Rather, they believe the world consists of interacting energy fields and that the systems with greatest available energy will prevail. This made a lot of sense to me. You know, if you go too close to the sun, you'll burn to a crisp. People with money and power usually prevail over people without money and power. In times of effective revolution, the disenfranchised gather their collective energy, which becomes greater than the establishment, and thus prevail.

Companies with the most committed, purposeful, concerned people, with the best products, tend to dominate the market. Having good ideas and strong intentions are important, but what's essential is the available energy. Sanchez's argument was that human beings are double beings. Part of us is purely energetic -- the energy of the sun; the heat, the vitality, the spirit in us, the part that can fly. And the other part of us is careful, survival-bent, linear, and prone to organization, power, and control.

In the background was my fascination with Albert Einstein's formula (E=MC2, energy equals mass times the speed of light squared). Einstein changed a world-view based on the notion that the output was energy. I've spent a long time looking for a similar formulation because I could see that most people in organizations treat each other like things, like objects. One deals with human resources, not human beings. It seemed to me that if organizations could be construed in energetic terms – the way Einstein did it for physics – a shift could be produced of equal magnitude as that which occurred from Newton's mechanical system to one that had far more flexibility and power. The more mechanical, the more procedural, the more non-human a system was, the less energy there appeared to be.

Energy Flows Where the Attention Goes

Also of great influence in my thinking was a book titled, The Urban Shaman, by Serge Kahlili King. One of his assertions was that "energy flows where the attention goes." My work was always shaped by where the CEO or the leader was putting his or her attention. My life is shaped by where I'm putting my attention. And with everybody I knew, their lives were affected by where they placed their attention. What I hadn't seen before was that energy accompanied attention and that certain kinds of attention enhanced energy. In organizations, outward results can be directly linked to the energy created from where the attention flows.

I then started to work with a musician and a poet, a Taos Pueblo Indian named Robert Mirabal. He and I became fast friends and we started doing training programs and other community work together. We developed a conversation based on the contrast between the linear and the metaphorical. Robert would say that his Tiwa language was metaphorical; the way his people thought was metaphorical, and what they were interested in was metaphorical, including their religion. And metaphorical thinking isn't very good for business. "English," he said, "was a language made up to do business in," and was far more

linear, goal-oriented, and time bound. Out of our engagement with one another, and experiencing the difference between him and his people and me (a mainstream guy), I came to see that there were really profound, existential differences between how they related to time, music, and dance versus results, productivity, and money. It was radically different.

My immersion with Robert in metaphorical conversation and metaphorical experience – whether through drumming, walks in the woods, or asking a stone what to do with one's life – demonstrated that there were effects that were surprising, remarkable, insightful, and that gave energy, vitality, and new life to old situations. I also saw that introducing linear thought and the English language tended to suppress that particular kind of energy. On the other hand, the kind of energy that produces penicillin, airplanes, and computers isn't available to the metaphorical mind in its pure form. I came to see that in a world in which everything is profane and nothing is sacred, energy and human vitality are suppressed.

During the same period I read that in the Kaballah, the ancient Jewish mystical tradition, a person's life works best when they are able to continuously integrate intellectual, physical, spiritual, and emotional energies. That seemed to be the key to the contextual shift I was experiencing: energy in its purest form is in the background of everything. But it gets expressed concretely in objects, results and money. It gets expressed emotionally in relationship and caring, love and generous listening. It gets expressed intellectually in creative thinking and inquiry; in the asking of good questions and the invention of new answers. And it gets expressed spiritually in those representations that we hold sacred; our highest principles. I saw that in companies, when things started to go awry, one of these energies was always missing. People were either not paying attention to measurement (so there were no results) and/or they weren't paying attention to relationships (so projects got undermined). Sometimes they weren't paying attention to principles, and the fundamental meaning went out of the whole thing and people became demoralized. Other times there was no innovation – just people saying and thinking the same things over and over again. Whatever energetic expression prevailed in a company was reinforced by the culture. Other thoughts were forbidden and people who most represented the culture became the CEO or the most important vice-presidents. People representing the type of energy most absent were often dismissed.

Some years ago I saw a video of Red Auerbach – the famous Boston Celtics basketball coach – speaking about what it means to be a coach.   One of the things he said was that his job was all about team spirit. It was all about watching the level of team spirit and whenever the level of team spirit went down, his job was to pump it up any way he could through challenge, hard work, practice, counseling, affection, or whatever it took to get that team spirit up. I saw then that energy is the same as team spirit in an organization. That's what we are fundamentally dealing with -- an organization whose team spirit is high, whose energy is high, will prevail, other things being equal.

On Suppressing Energy

Over the years, I have seen and recognized the enormous effect of the CEO's personality and way of being on the energy of a company. All personalities have limitations and drawbacks. But when somebody has the top position in a system, the effect of what they focus on and what they suppress is immense. Whatever a CEO's automatic way of relating to the world, whatever their way of dealing with relationships, or with conflict, or with results and measurement, or with finances or thinking, gets reflected throughout the organization. Too many CEOs only allow real creative thinking in the areas that interest them and simply avoid those areas that appear more threatening. Now this is human nature, and it's to be expected. But if CEOs could begin to see the world in energetic terms, they would see the suppressive affect of some of their behavior on the energy of their company and people's power to execute the very things they most want implemented.

In my experience, this is not always the case. Sometimes there are leaders, CEOs and others, who have a certain integrity about balancing energy and really pay attention or try to pay attention to all of it -- to results, good thinking, relationships, and to principles. In those situations things seem to work better. But it comes from a high level of integrity. They are willing to risk activity in areas that really make them uncomfortable. They might not like it, but are willing to do it because they stand for the integrity of each type of energy being represented. The results are always phenomenal. Untold millions of dollars are saved, and money is made for the company. Manufacturing plants are preserved that would have been lost because of higher costs. All because they have the integrity and are willing to bring forward integrity in a balanced way.

Over time, I came to see that there was a probable relationship between energy as I defined it and integrity. In the absence of that integrity, the energy is absent. The person doesn't feel bad; they simply do not recognize that anything is missing for them. I have known some terribly ineffective people, and they just did not see what was missing for them. I have seen people in nonprofit organizations and in business for whom measurement and results are missing – but they don't even know it. Once people start to notice which kind of energy is missing or absent, then they can take it upon themselves to generate it for themselves and get what they want and need.

There are really two things going on at the same time. There is a physical world with concrete properties. For instance, when I touch my car, it is both metal hard and cushion soft. And yet, when I look at my car in terms of all of the energies that were brought together to create it, and how it carries me forward and lifts my spirits, I can see my car as if it were a wave of energy. As in physics, there are particles (concrete) and there are waves (intangible and in motion). Both seem to be true. But if you want to move forward and develop effectively in an organization, people need to start seeing what's happening not just from a concrete perspective but also from a wave-like, energetic point of view.

In many organizations, force and coercion are often relied upon to make things work. In the end, however, force can only be effective for short periods of time – and all the while it drains energy away. Using force and fear, most product developments don't produce products that work. Most company mergers do not succeed by their own standards. When people deal with each other and with problems as concrete things, they create an abstract conceptual relationship, which automatically suppresses energy. The more people can see each other and the challenges surrounding them energetically, the more compelling situations become, and the more energy is unleashed.

Conclusion

A new framework is available in which one comes to accept that the world, including an organization and the people in it, consist of interacting energy fields. The people and systems with the most energy will prevail. Our job here is to be responsible for seeing what kinds of energy are missing and needed, and providing just that. Whether it's the energy of measurement and results, relationship and emotion, good thinking and innovation, inventiveness, creating possibility and inquiry, or the energy of standing up for and acting

on principles (whatever you hold dear). Ultimately, this is a matter of individual responsibility and a shift in point of view. This shift is equivalent to Einstein's formula, where your overall available energy equals your relationship to these various kinds of integrity – in performance, relationship, innovation, and principles.

Each kind of integrity and energy is already there – it is simply a question of naming it and claiming it.

Curated: 2015/ The Authors

Alexander Berlonghi

Alexander has been consulting across three continents since 1977. His firm, the Institute for the Practice of Ontology (IPO), now provides Coach Certification programs in the business world (organizational, project management, and executive coaching) and in personal life empowerment (life, relationship, and parent coaching). A licensed Marriage & Family therapist, Alexander is also a globally recognized expert in Risk Management, Crowd Management, Project Management and Special Event Planning. Currently his time is significantly divided between Northern New Mexico, Milan Italy, and multiple venues in South America.

Maynard Brusman

Dr. Maynard Brusman is the president of Working Resources – a strategic talent management, leadership consulting, training, and executive coaching firm. He specializes in offering customized individual and organizational collaborative consultation services and workshops on hiring, coaching and retaining emotionally intelligent people; executive selection and assessment; psychological testing for employment screening; performance-based interviewing and selection; multi-rater 360-degree feedback; interpersonal skills; career development; change management; and executive/leadership coaching. He facilitates vision, mission, and values retreats. For over twenty years, Dr. Brusman has trained and coached hundreds of people in companies, law firms, health care organizations and educational institutions.

Bill Burtch

Bill Burtch, SPHR, ACC is the President of Harmony Coaching & Consulting a management consultancy focusing on Executive/Corporate Coaching, Human Resource Management, and Training Design & Delivery. Bill has partnered with organizations such as Hilton Hotels, FedEx, First Horizon Bank, Brother Industries U.S., Memphis Child Advocacy Center, and Methodist LeBonheur to impact the profitability of their business through masterful leadership and human resource management. Bill holds degrees and certifications from Bowling

Green State University, Coach U, the Society for Human Resource Management, the International Coach Federation and Targeted Training International. His education and work experience have given him extensive expertise in the areas of leadership and management development, team effectiveness, customer service, mergers and acquisitions, and call center management.

Bill Carrier

Bill Carrier, President of Carrier Leadership Coaching Inc., leads an organization which specializes in coaching senior and high-potential executives in leadership and personal development. A graduate of the United States Military Academy at West Point, former Army officer, and Rotary International Ambassadorial Scholar, Bill is a winner of the Navy's Zumwalt Award (annually given to the best captain of a ship in the US Navy). With more than a decade of business development and sales team leadership, Bill has extensive experience with senior-most HR executives of billion-dollar companies across the US, Australia, and South Africa to leverage leadership assessment and human capital measurement to improve company culture and performance.

Anita Doron

Anita Doron was born in Transcarpathia of the former USSR - a little known land of nomadic ghosts, barley mush and apricot brandy. At age 12, Anita's first film - an environmental protest piece - raised the ire of the Soviet bureaucracy who attempted to sabotage the process. A decade later, following an illegal escape from the USSR, Anita's short films ("Not a Fish Story" and "Elliot Smelliot") premiered at the Toronto International Film Festival and had a successful television run, as well as a Banff Rockie Award nomination. Anita directs music videos through 235 Films and has recently shot and co-directed a CBC documentary with Veronica Tennant about Judith Thomson and the unique play "Body and Soul". Her short animated film on Tony Dekker/Great Lake Swimmers premiered at the 2009 Toronto International Film Festival. Anita is a recipient of a 2010 TED Fellowship.

Kristin Teresa Eggen

Kristin Teresa Eggen has offered professional coaching services since 2005. She is a trained journalist specializing on in-depth articles. Receiving a Masters of Arts degree in the field of religious science, Eggen specialized on New Age religion and identity crisis in our era of post-modernity. Her thesis was named —*I once was lost, but now I've found: Religious identity in Post-modernity.*" Kristin Teresa is still driven by a deep feeling of curiosity – a need of *finding out*, where the organization's or person's narrative comes from, what does it mean, and what would happen if the narrative changed? As a coach, she is working in small and big organizations, mainly in creative media companies.

Jody Michael

Jody Michael, BCC, MCC, LCSW, is founder and president of Jody Michael Associates, a Chicago-based coaching and consulting firm that focuses on individual, team and organizational transformation, serving local, national and global clients. Ms. Michael's corporate expertise includes executive coaching, leadership development, team coaching and organizational accountability makeovers. Her individual coaching services encompass career coaching, trader coaching and personal/professional development work. Jody Michael is a Board Certified Coach, Master Certified Coach and a University of Chicago-trained psychotherapist. She has consulted and coached in a wide range of corporations, from Fortune 10 to small business. In addition, she has been featured on MSNBC Primetime, Discovery Channel, CNN, NBC's "Today Show," WGN's "Chicago Confidential" and in the Chicago Tribune.

Agnes Mura

Agnes Mura, MA MCC, forged her approach to people and organizations in different political systems, European universities and a dramatic life of geographic and professional migrations. Her careers as an academic, senior international banker and then executive coach reflects her relentless curiosity for

the ways individuals add value in the world, while staying true to their ever-expanding sense of self. Inspired by her studies in philosophy and linguistics, steeped in the human potential movement as much as in the world of global business, she is among the Master Certified Coaches (MCC) of longest-standing experience in the US. Fluent in six languages, she coaches C-suite executives and their teams in Global 1000 companies, and delivers systemic Leadership programs worldwide. For over fifteen years, she has been an Assessor for the ICF, certifying coaches and accrediting coach training programs world-wide.

Valerie Naidoo

Valerie is a Career & Expats Coach and Recruiter. Her experience as an expat comes after spending time in the United Kingdom (in London), India, UAE and she now lives in South Africa. Since her return to South Africa Valerie has been dedicating her life to the development of human potential by building up the Womenaire Society into a cave of inspiration for women around the globe. Valerie has mentored 100s of women on advice in careers, lifestyle, relationships, business, etc. and she is also affiliated with CenturionHopeFoundation, where she has been undertaking outreach projects for women.

Gary H. Quehl

Gary Quehl is President of Quehl Associates, a national firm providing services to colleges, universities, and nonprofit organizations in the areas of executive coaching, leadership development, comprehensive strategic planning, governing board education, and fund raising. Dr. Quehl also served for sixteen-years as President and CEO of two Washington, DC-based, higher education associations: Council of Independent Colleges (the national service organization for private colleges and universities) and Council for Advancement and Support of Education (the international service organization for fund raising, public relations, marketing, and alumni officers from 3,400 colleges, universities, and independent schools in 74 countries). Gary has authored or co-authored 32 books and articles and has served on 50 boards during a 45 year period. He co-founded

the Center for Nonprofit Leadership and has directed its Sage Leadership/Civic Engagement Project.

Paulette Rao

Paulette Rao is an executive coach, trainer, speaker, author, and marketing expert. Paulette's leadership coaching is informed by her 28 years of experience as a senior executive and sales/marketing leader in corporate America. As a managing director for Marsh, the world's largest risk services firm, she managed operations including the P & L of its Northeast employee benefits division. She was one of 1,000 managing directors, of which only 100 were women. In that role, Paulette coached hundreds of sales/marketing professionals to establish and develop significant relationships with their clients. As a Master Certified Coach, Paulette works with senior executives, high potentials, and emerging leaders at Fortune 500 and smaller organizations. While she has worked extensively with senior male executives, she has gained special notoriety working with female leaders to grow their confidence, presence, and leadership skills, based on her own personal experience.

Dorothy Siminovitch

Dorothy E. Siminovitch, Ph.D., MCC is principal of Gestalt Coaching Works and AWAREWORKS International, and a Master Certified Coach and consultant to organizational leaders, executives, and groups worldwide She is co-owner and faculty of the Eurasian Gestalt Coaching Program (EGCP) in Istanbul. She co-founded the International Gestalt Coaching Program (IGCP), the first Gestalt-based coach training program awarded International Coach Federation (ICF) certification. EGCP in Istanbul is the second Gestalt-based coach training program to gain ICF certification. Dorothy received her doctorate from Case Western Reserve University's Department of Organizational Behavior. Her Gestalt institutional affiliation is with the Gestalt International Study Center based in Wellfleet, MA. She has presented training and development opportunities at the Organization Development Network's annual conference and the International Coach Federation Conference..

Charles Smith

Dr. Smith is Chairman of The Breaking Free Initiative LLC. The Initiative is for courageous senior executives, business directors, conscious capitalists, professionals, social entrepreneurs, and consultants who want to permeate their own work and constituencies with the ability to Break Free of the gravitational force that binds them to seemingly unchangeable culture and identity. Clients have been ambitious entrepreneurs and heads of organizations facing big challenges with people, culture, and important transitions. Charlie holds a Bachelor's Degree in Social Relations from Harvard College, an MBA from the Harvard Business School, a Ph.D in Organizational Behavior from Case Western Reserve University, and a Certificate in Gestalt Methods from the Gestalt Institute of Cleveland. He was Visiting Associate Professor of Organizational Behavior at Sir George Williams University in Montreal and taught at the McGill University Centre for Management Education. Dr. Smith has written two books, "The Merlin Factor" and "Navigating from the Future."

Kevin Weitz

Kevin is Principle Organizational Consultant with Intel Corporation working with their leadership team to optimize Intel's culture to support its business strategy into new markets. For over 25 years Kevin has consulted with organizations like Chevron, Levi Strauss & Co, Wells Fargo Bank, Pacific Gas & Electric, British Columbia Hydro and Standard Bank of South Africa on large scale organizational transformational projects. These transformational initiatives are almost always extremely challenging for these organizations, especially for employees and other stakeholders. Kevin's transformation work focuses on engaging leader's, employees and stakeholders on becoming more adaptable and resilient to constant and disruptive change. Kevin has a master's degree in business administration and is currently pursuing his doctorate in organizational psychology at the Professional School of Psychology in Sacramento California.

Frank White

Frank White is a graduate of Harvard College (Class of 1966) and received a Rhodes Scholarship enabling him to earn a MPhil from Oxford University in 1969. Frank is a writer who has spent much of his career thinking about the implications of space exploration for human evolution. He has authored a total of 10 books, including: *The Overview Effect*, *The SETI Factor*, *The New Camelot, March of the Millennia* and *Think About Space* (with Isaac Asimov), *The Ice Chronicles* (with Paul Mayewski), and *Decision: Earth*, a novel. In *The New Camelot*, Frank offers a new interpretation of the Apollo program, comparing the Apollo astronauts to King Arthur's Knights of the Round Table, and suggests that the Overview Effect is the "holy grail" of our time. Frank is now working on a revision of *The Overview Effect* and is a cofounder of the Overview Institute, established in part to carry forward the work that began with publication of his book, which celebrated its 25th anniversary in November 2012.

EDITOR'S BIOGRAPHIES

William Bergquist, Ph.D.

An international coach and consultant, professor in the fields of psychology, management and public administration, author of more than 45 books, and president of a graduate school of psychology. Dr. Bergquist consults on and writes about personal, group, organizational and societal transitions and transformations. His published work ranges from the personal transitions of men and women in their 50s and the struggles of men and women in recovering from strokes to the experiences of freedom among the men and women of Eastern Europe following the collapse of the Soviet Union. In recent years, Bergquist has focused on the processes of organizational coaching. He is coauthor with Agnes Mura of *coachbook*, co-founder of the *International Journal of Coaching in Organizations* and co-founder of the *International Consortium for Coaching in Organizations*. His graduate school (The Professional School of Psychology: www.psychology.edu) offers Master and Doctoral degrees in both clinical and organizational psychology to mature, accomplished adults.

Suzi Pomerantz, MT, MCC

An award-winning executive coach, speaker, facilitator, and author with 22 years of coaching and teaching experience working with leaders and teams in over 200 organizations internationally across Government agencies and private sector clients, including seven companies on

the Fortune 100 list. Suzi specializes in helping executives, teams and organizations find clarity at the intersection of leadership and business development. She was one of the first executive coaches to receive the Master credential from the ICF in 1998 and teaches at several of the top coach training schools. She was a founding board member of the ICCO and IJCO, and has authored over 30 publications and 8 books about coaching, ethics, and business development, including the best selling book Seal the Deal. She is the founder of the Leading Coaches' Center and co-founder of the Library of Professional Coaching, provides pro-bono coaching to TED Fellows through SupporTED, and has spoken at the ICF annual conference, the Metro-DC ICF conference, Linkage, and many other venues. http://www.suzipomerantz.com

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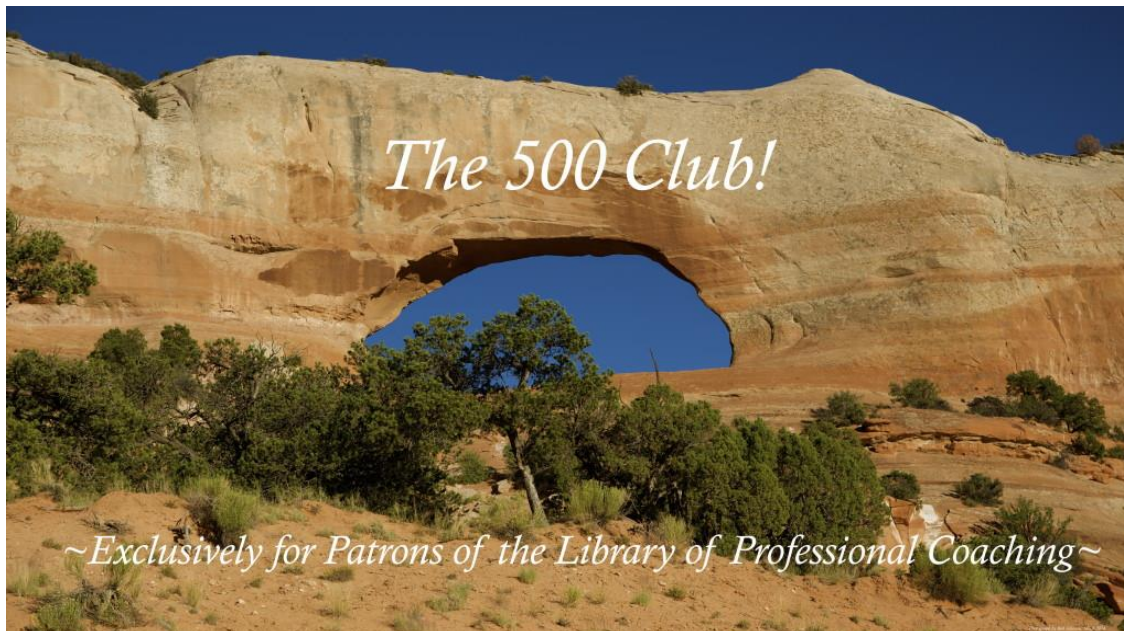
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In honor of passing the 500-document goal, a select panel of coaches has identified the best articles in the library. Some of the articles concern the tools of coaching, while others identify some of the key concepts and strategies associated with professional coaching. Additional articles explore themes that complement the coaching profession–including informative and provocative essays regarding leadership and the complexity of organizational life. Finally, there are several articles that focus on the life and work of specific leaders in the field of professional coaching. We are assembling these articles and producing a digital book that will be available at no cost to members of the 500 Club.

EXCLUSIVE MEMBERSHIP IN THE LPC WRITERS CIRCLE

Members of the 500 Club are eligible to join the LPC Writers Circle at no additional cost.

Membership in the LPC Writers Circle includes:

1. **Writer's Call:** A monthly one-hour Writers Circle meeting (using video conferencing services provided by LPC). During this meeting a specific book related to professional coaching will be briefly reviewed (so that Writers Circle members can be up-to-date on recent publications and decide whether or not to purchase the book). The author may herself/himself present the summary description or it may be offered by a member of the Circle. In addition, one member of the Circle will be invited to present their preliminary work (providing an outline of their work to the other Circle participants if desired) and invite suggestions from the other Circle participants.
2. **Writer's Cottage:** Opportunity for Circle members to receive first-hand support in preparing an article or book from Dr. William Bergquist, co-curator of the Library. This support can be offered via video conferencing or in-person at the LPC Writer's Cottage (located on the edge of the ocean in the State of Maine). The LPC Writer's Cottage contains a wonderful library of **nearly 3,000 books** related to the field of professional coaching (donated by patrons of LPC). The LPC Writer's Cottage provides current and future authors with a unique opportunity to work in a beautiful location directly with Dr. Bergquist and with a substantial and unique physical library (to compliment the digital library available on-line through LPC).
3. **Writer's Retreat**: TBD. By application only. A limited number of spaces will be available to writers who wish to collaborate by traveling to Maine for a writer's retreat that makes use of the Writer's Cottage and the extensive LPC library collection housed in the Writer's Cottage.

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