

Learning About Leadership: Surprise, Agility and Collaboration

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This had all of the markings of an impending disaster. The New Executive Coaching Summit (NECS) was scheduled to begin at what was supposed to be the “ending” days of the Covid-19 dominance. Yet, this ending was certainly not the state of affairs during the last week of April in 2022. Many senior level coaches who were planning to attend the in-person NECS either cancelled because of the virus or transferred from the in-person event to our concluding virtual session of this summit. Plans were changing and major adjustments had to be made up to two days prior to the start of NECS. Then there were the delayed and cancelled airplane flights to Portland Maine (near where the summit was held). Covid had its impact on the availability of flight crew.

Initial Challenges: Restaurants and Lobsters

Careful planning had taken place regarding how to manage the gathering of NECS participants who were staying at several hotels in two Maine communities (Brunswick and Harpswell). The sure thing was to convene on the first evening at one of the hotels in Brunswick so that we might dine together at the hotel’s restaurant. What did we discover: the restaurant was closed! Once again, a Covid-related staffing issue. We met in the hotel lobby and checked on other restaurants in the neighborhood. They were also closed or would soon close (at an early hour).

Only one choice: a noisy pub (bar/restaurant) that mostly served local college students. Not a very good option. I was waiting for some late arriving NECS participants, and we then walked to the pub. What did we find? Assembled around two tables at the back of the pub were all of our participants. The pub was practically empty and very quiet. Our tables were bathed in low lights and an immediate sense of collegiality as folks shared stories about their journey to Maine. The waitstaff were wonderful and adjusted immediately to the sudden onset of 20 folks who were long past college age! Our NECS participants had immediately demonstrated their ability to adjust rapidly and with grace to a change in plans. Agility and collegiality were in full display.

These leadership skills were required throughout the three days of the summit. Other restaurants were unexpectedly closed and the weather was much too wintery and often storming for some of the outside events we hoped to engage. Lobster meals were featured in the promotion of this summit, yet the nearby lobster pound for the first time in my memory was out of lobster and the search of many NECS participants for a decent lobster roll was derailed by closed restaurants and scarcity of caught lobsters (once again Covid-related staffing issues). Everyone adjusted their expectations and further built their sense of comradery, adding stories about elusive lobsters and closed restaurants to their shared narrative.

The Big Challenge: Technological Collapse

The real challenge, however, was awaiting us. It occurred during the carefully planned virtual session, when 15 senior level coaches were joining us for a virtual, Zoom-based three-hour session. Reports from the previous two days were to be made (using Power Point) and a tightly scheduled set of breakout rooms and plenary sessions were to take place. Both in-person and virtual participants were provided with time and a setting in which to comment on the presentations. Everything was to be video-taped, so that the comments could be preserved and later transferred to Vimeo for inclusion in the Library of Professional Coaching. To ensure that we had Internet stability, I suggested that we move the final session to my home and use my own computer which had served me well over several years (never any problems even when working in other locations throughout the world).

As one of the facilitators of NECS, I was pleased with the design of this final session and with our plans for ensuring that there would be no technological problems associated with the Zoom session. Nothing was going to go wrong . . .

We began the virtual session as planned. One of our NECS in-person participants opened the session with skillful facilitation, which led to the first power point presentation. This presentation began for less than a minute and my computer suddenly froze and soon went black. It refused to open again and we were left with no communication with our virtual participants. They could communicate with one another but not with us at the in-person site (my home). Understandably, I was quite upset and frankly embarrassed that I had “messed everything up.” I frantically tried to get my computer to start up again and vowed to throw it in the trash bin once this meeting was over!

While I was focusing on my own psychological wounds, the rest of the in-person leaders and the virtual leaders sprang into action. After about a minute, one of the virtual participants (my colleague Bill Carrier) began facilitating the virtual session, inviting other virtual participants to reflect on what they have done (and other people they observe have done) when faced with a technological challenge such as they all just witnessed. Wonderful, in-the-moment reflection was engaged that built on this “teachable” experience. Members of the virtual group deployed their analytic skills and became “self-coaches.” In the past, I have written about exceptional people who can stumble over a rock and then pause to reflect on the rock and their stumbling. This coach-like reflective process was fully evident among those attending the virtual session.

At the same time, the in-person NECS participants were working together to problem-solve. One of them set up their own computer as a new base for the Zoom conference. Messages were sent out to the virtual participants to move to the new Zoom location. The new computer was placed closer to the router to ensure that the blackout of my computer wasn't produced by a failed connection to the router. Ideas were rapidly shared. Many different people lent a hand in providing both coordination and direct services. Soon the new Zoom session began. I could sit back and appreciate what was being offered. The breakout rooms were set aside, and a powerful, generative dialogue began with “all hands on deck.” I witnessed agility and collaboration in response to a technological challenge. I witnessed leadership that was being exhibited by senior-level executive coaches who are usually doing the coaching about leadership, but in this instance were engaging in leadership themselves. It was amazing!!

Imperfectly Perfect

What did I learn about leadership – and what might other NECS participants have learned? In setting aside my own narcissistic wounding, what was I being taught? Things were certainly not perfect. However, as one of our NECS participants noted, this virtual session (and frankly the entire NECS program) was “imperfectly perfect.”

Observers of the Imperfect Process

Maureen Simmons, the administrator of the NECS program, is not “officially” an executive coach. However, she is a keen observer of human behavior (as a long-time schoolteacher). She offers these insights about leadership at NECS. She is focusing on the spontaneous virtual facilitation (which she was able to observe being on a computer in Dallas Texas that was independent of my own computer):

Being that this was an Executive Coaching Summit, what I saw take place while all things went off line in Maine was inspiring to say the least. There I sat in the "digital background" with a group of coaching professionals, some who knew each other, some who only had time to meet each other for a few minutes, and all were waiting for their online session to begin ... when it didn't. They began a conversation independently and eloquently with each other -- discussing how they could relate and use this technical breakdown incident within their own professions when coaching other executives in organizations. As the technical breakdown continued far longer than anyone could imagine, I began to pass to the online group information that Suzi, Garry and Bill were texting me to relay to the on-line participants. This was more discussion information and assigning Bill Carrier as the temporary leader until things went back online.

She goes on to note the following:

It may not have been the originally planned agenda for the first hour of this V-NECS, but it was inspiring to view (from the background) nevertheless. These amazing participants stepped up without a blink of an eye and began not only their own conversations, but the suggested discussions from the Maine Team that were deep and inspiring. I guess sometimes the best laid plans do not work out, but if you are in a room full of executive coaches -- this is not a problem at all!

I also asked one of my colleagues, Garry Schleifer (one of the co-planners and facilitators of NECS) to offer his description of the leadership and learning that took place at the summit. I briefly interviewed Garry and transferred the video recording of this interview to Vimeo. Here is the interview (complete with the dropping of my computer-based video camera at the end of the session—this final event is left in this recording as a homage to technological glitches!!):

The Shadow Knows!

The phrase “the shadow knows” (from an old radio program) seems appropriate in describing what happened to me at the time of this technological glitch. Actually, I am returning not to the radio

program, but rather to the wisdom of Carl Jung—who wrote about the relationship between our *persona* (the self we present to other people) and our *shadow* (a powerful, often unconscious dynamics that operates in our psyche to correct for the *persona*) (Jung, 1979). In my case, the *persona* I was presenting the world was in full force and in command. I was being the competent facilitator and event planner. A touch of narcissism inevitably accompanies a successful *persona*. This was particularly evident during the summit—for during the Covid-invasion I had stayed pretty much away from other people—except in the digital world. While I am an introvert, I do like the occasional interaction with other people and appreciate their appreciation of my work. I was relishing my role.

It is at these points when the *persona* is fully in operation and narcissism can puff up a sense of personal worth that Jung's *shadow* function comes in to correct the situation and poke a hole in the puffed-up self. I found that I was not indispensable. Other people were doing all of the problem-solving. As Maureen Simmons noted, these NECS participants “stepped up without a blink of an eye”. Furthermore, they were supporting me (not blaming me). They saw and appreciated the “real” Bill Bergquist and said: “let us lend you a hand.”

This seems to be the finest kind of leadership and I learned about (or perhaps relearned) what it means to be truly collaborative and trusting of the process and the strength of community. As both Maureen and Garry noted, the room (actual and virtual) was filled with skillful executive coaches who knew what to do. Maureen put it this way: “if you are in a room full of executive coaches – [technological collapse] is not a problem.” I suspect that many of the clients being served by these senior executive coaches would have loved to witness how their coach was “practicing what they preach!”

The Outcomes

As I reflect on my own personal learning that came out of this summit meeting, I discover that there were many personal insights. These insights were important for me and would not have occurred if the more general learning that took place for me (and I suspect, for many other participants) was not prevalent. I want to briefly comment on two of these more general outcomes.

Learning from Mistakes and Second Order Learning

One of the major insights offered by Chris Argyris, Don Schon and their protégés (including Peter Senge) is that members of an organization should learn from their mistakes. In our challenging world it is impossible to avoid making mistakes. However, it is quite possible to learn from these mistakes. People are “stupid” not when they make a mistake, but when they make the same mistake many times. Organizational learning is based on this fundamental conclusion (Argyris and Schon, 1978). The reflective process that took place among the virtual NECS participants and later among the in-person and virtual participants working together exemplifies this process of organizational learning.

What I observed actually went beyond just learning from the mistakes that were made. Something called “second-order learning” was taking place (Bateson, 1972). This is about learning about learning. Comments during the concluding session and during subsequent conversations have focused on the process of in-the-moment learning that occurred. As Garry Schleifer noted in our recorded interview, this learning was based on collaboration rather than competition. No one (including me) was being

blamed; rather we were all being buoyed up by the good will and trust that was exhibited by all members of this temporary NECS community.

Being Surprised

One of my heroes, Michael Polanyi (the Nobel prize winning scientist who became a philosopher later in his life—after fleeing Germany and the holocaust), was asked an important question regarding reality. He had written often about the arbitrary nature of most “realistic” assessments and was challenged to identify how he knew that something is “real.” (Polanyi, 1969) Apparently, Polanyi paused and then said that he knew something was “real” if it surprised him. One of his colleagues then indicated that this surprise seems to be what it is like to confront *Yahweh*.

Polanyi took a step back. He had grown up with a Jewish heritage but had left it far behind. Yet, here was his heritage coming back to the fore. *Yahweh* may represent something about reality for Polanyi. As I noted with regard to the *Shadow* function, our encounter with reality might be found at the moment when we are surprised, and powerful unconscious processes and images emerge to yield rich and profound insights. Such was the case for me at this summit – I was surprised and I learned.

Carl Jung, who has provided us with the description of the shadow function, has something similar to say about surprises and “reality”—though he addresses these matters at a different level than Polanyi. In his autobiography (*Memories, Dreams and Reflections*) Jung (1963, p. 356) offered the following reflection on his own life and learning:

It is important to have a secret; a premonition of things unknown. It fills life with something impersonal, a *numinosum*. A [person] who has never experience that has missed something important. [They] must sense that [they live] in a world which in some respects is mysterious; that things happen and can be experienced which remain inexplicable; that not everything which happens can be anticipated. The unexpected and the incredible belong in this world. Only then is life whole. For me the world has from the beginning been infinite and ungraspable.

Like Polanyi, Jung (1963, p. 199) set out to be a scientist—and like Polanyi was quite successful at his craft. But then he was surprised:

As a young man my goal had been to accomplish something in my science. But then I hit this stream of lava, and the heat of its fires reshaped my life. That was the primal stuff which compelled me to work upon it, and my works are a more or less successful endeavor to incorporate this incandescent matter into the contemporary picture of the world.

For Jung, the surprise is found in the surfacing of unconscious content. Reality is to be found not in (or at least not just in) the conscious world. It is to be found in the often “awe-filled (*numinostic*) world that undergirds our conscious view of the world. He finds that his unconscious is providing him with the “gift” of fiery new learning. Jung actually considers this “an act of grace.” (Jung, 1963, p. 199)

There was another moment during the summit when I found myself surprised and open to new learning—and it probably aligned with both Polanyi’s surprise about his Jewish heritage and Jung’s perspective on unconscious life. I participated in a small group exploration of the role played by spirituality in the world of executive coaching. Is it appropriate for spirituality to enter into a coaching

dialogue with executive leaders and, if so, how might it be engaged? As the one “secular” member of this small group, I agreed to be the “client” in a coaching session oriented toward spiritual matters.

My seasoned coach (with a strong spiritual background) asked me to focus on my late teenage years and early 20s. Where was I at this point in my life and what values and life purposes were I struggling with at this time? This was a wonderful starting point and I surprised myself with a reflection back on this time in my life and emerged from this coaching session with some important personal insights. I noted to members of this group that I could have used this coaching session several years ago when I was making difficult decisions regarding the future of the graduate school where I had served for many years as president. At least in this one instance, an exploration of spiritual formation would have been of immediate value to me as a leader in an executive position.

Conclusions

In my early career as a psychologist and a young organizational consultant, I was enamored by the life and work of Kurt Lewin. (Marrow, 1969) He was not only one of the founders of modern-day social psychology, but also helped to create the field we now call “organization development.” Lewin loved surprises as well as thoughtful (and playful) reflection on these surprises. Apparently, he was always ready to try something out in a group setting and to learn from this experimentation. I find that this spirit of experimentation (action) and learning (reflection) is to be found in the early pages of the original book written about that remarkable social invention called the “T-group” (or “training group”). (Bradford, Gibb and Benne, 1964)

Originally created during a conference on antisemitism and racism in America, the T-group became a new experiential way in which to explore and become more “sensitive” to personal attitudes and behaviors. “Sensitivity” did not initially refer to one’s access to feelings; rather, it was about being sensitive to the processes that operate in groups regarding the ways attitudes and behaviors impact such matters as leadership, authority, communication – and prejudice.

I think that Kurt Lewin’s spirit was present during our NECS program. He would have delighted in the rearrangements that needed to take place when the technology broke down. A big smile would have appeared on his face when Bill Carrier and his virtual colleagues decided to examine their own reactions to the technological breakdown and their own personal experiences with these breakdowns in their work (and personal) life. While we were not running a T-Group, a container was created (as Garry Schleifer mentioned) that enabled agility and collaboration to win the day. Thank you Kurt . . . and thank you my NECS colleagues for the rich learning you have provided me.

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