



Companion
to the 2012
Award-Winning
Innovative
Leadership
Fieldbook

INNOVATIVE LEADERSHIP WORKBOOK FOR EMERGING LEADERS AND MANAGERS

Field-Tested Processes and Worksheets for Innovating Leadership,
Creating Sustainability, and Transforming Organizations

MAUREEN METCALF



Praise for the Innovative Leadership Workbook for Emerging Leaders and Managers

Part of a larger series that addresses various stages of development throughout one's career, the Innovative Leadership Workbook for Emerging Leaders and Managers lays out a process for individuals, early in their career to think about their development in the context of the organizational culture and systems. It also provides a host of tools to address different needs—a critical success factor for attracting and retaining talent in varying career stages in an organization.

***Kate Terrell, Vice President, Human Resources
Global Products Organization, Whirlpool Corporation***



With the raging war for talent, organizations are looking for straightforward, easily accessible ways to develop their existing workforce. HR organizations will be pleased to find this workbook flexible enough to be used by aspiring leaders independently or as part of a comprehensive leader development program. If you're new to the challenges of leadership or have been figuring it out on your own, this workbook will guide you every step of the way!

***Michelle Reese, Associate Vice President, HR Strategy, Communications,
and Change Management, The Ohio State University***



Great leaders acknowledge the need for constant growth and development. The concepts in this workbook provide a framework that supports this development while emphasizing the particular needs of an emerging leader. Through the use of this workbook, you will be able to define your own strengths as a leader and gain important insight into how to use those leadership capacities to influence others, create a vision, and to make a positive contribution to an organization.

Amy Barnes, Ph.D., Faculty, The Ohio State University



Strong technical skills are the foundation of a great engineer. Just as engineers, the most successful leaders best augment these skills with self-awareness, authenticity, an ability to manage multiple highly complex issues, and an ability to navigate organizational politics with finesse. This workbook helps strong performers build on those skills to become either stronger individual contributors or highly effective leaders.

***Ahmet Selamet, Chair, Department of Mechanical and Aerospace Engineering,
The Ohio State University***



This workbook helps you ask key questions of yourself as you emerge into leadership roles. Be patient as you grow. Take notes and be grateful for both good and mediocre leaders. The good ones model the way. The bad ones remind us what not to do. This workbook will help shape you into an "excellent" leader.

***Carla Paonessa, Chair, LeaderShape Board of Directors
and Retired Managing Partner, Accenture***

As a recent college graduate, I had been looking for opportunities to further my development as a leader. The Innovative Leadership Workbook for Emerging Leaders and Managers has helped me to build invaluable skills to support moving into a new entrepreneurial role. The exercises help me understand my strengths and determine my developmental goals. The workbook and exercises have shaped my approach to life, both personally and professionally.

***Anna Klatt, Entrepreneur, Mindful Management, LLC.,
LeaderShape Institute Graduate***



Maureen and her co-authors have put together a fantastic workbook for young leaders that provides ways to apply leadership theory in a structure that makes sense. The examples of the vision-based exercises will be useful for anyone looking for a foundation on which to begin.

Roger Chen, Google Analyst, LeaderShape Institute Graduate



In today's dynamic world, it is critical for organizations to create a leadership development pipeline that will enhance its ability to create distance and differentiation from the competition. Leaders need solid skills to be prepared to meet the growing complexity of problems they are facing on a daily basis. This workbook affords organizations the opportunity to develop leaders using a self-paced approach that can augment internal or external development programs.

Michael Linton, Retired CEO Adecco, CEO Staffing Leadership



A seasoned mentor will guide you through the early stages of your development as a leader. For those of you who don't have that mentor, there's Innovative Leadership for Emerging Leaders and Managers. Guided by this book, you'll develop your understanding, testing, and learning about your own leadership.

***Jim Ritchie-Dunham, President of the Institute for Strategic Clarity and
Adjunct Faculty, EGADE Business School, Harvard***

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FOREWORD

“Leadership is a choice.” - Warren Bennis

This quote by Warren Bennis, widely known as a leadership author and leader in higher education, is my favorite. Hands down. It is simple, eloquent, easy to remember. And right. Clearly, this is my opinion, but as someone who has read and heard numerous quotes on leadership throughout my life, I keep coming back to this.

We have many choices to make in our lives. We can choose our career, our partner, our attitude, our dinner option, but perhaps there is no more important choice to make in our lives than how we are going to make a difference with the limited time we have on this planet. Far too many of us *choose* to live lives of insignificance and mediocrity because we don't see ourselves as leaders, or as even having the capability to make a difference in our communities much less our own lives. So we bounce from day to day without purpose or passion.

I have used this quote from Bennis quite often in my work leading a not-for-profit organization in an attempt to de-mystify the concept of leading. In attempts to define it, we have made leading far too complicated. I have been keeping a list of all the books on leadership that have thrown another adjective in front of “leadership” to sell their version of it. *Ultimate* leadership. *Super* leadership. *Principled* leadership. My favorites being *liquid* leadership, *food* leadership (seriously), and *boot strap* leadership. Go ahead, look for them on Amazon, or in the bookstore. They are there.

A good question to ask is, “Why are there so many books out there on leadership?” Other than because it is a popular topic and people want to make money by window dressing their own version of leadership, I can think of only one other connected reason: People want to understand leadership. They want to see how it's defined and how to “do” it. So, they buy the books.

We need leaders. We need them now more than ever. We long to be led. Really led. I don't care as much about the number of followers that a leader has as much as I want to see people using their lives to pursue something that they are passionate about and choosing to make the world a better place in a small (or large) way.

All of this brings me to this book. I am passionate about helping young people connect with the idea that they can lead. Not because they have a title next to their names, but because they have a passion, skill, or talent that the world needs, and they just haven't realized it yet. That is where the concept of emerging leaders comes into play. We need to do more to help leaders emerge, help young people, in particular, figure out that they can lead and know that we need them to lead. They don't have to be in front of the room, but they need to participate in the room. They don't need the title, but they need to act like they have it. They don't need followers, but they need to do something that is worth

following. They need the patience to plant seeds, try new ideas, and fail miserably. Emerging leaders need our support, our encouragement, and our willingness to set them loose and figure it out on their own. We cannot weigh them down with the ideas of the past and how past generations saw leadership. They need to make their own meaning of the concept and wrestle in the mud with hard conversations that produce hard solutions. They need us to get out of their way and give them room to grow with their own understanding and vision. They need a guide, not a prescription.

Maureen has done an excellent job of providing the questions, but not the answers. She has cut through the complexity of the topic and framed the process of becoming a leader in a way that is simple, but not easy. The activities and conversations in this workbook will help readers figure out where they can best make a difference and, more importantly, what they need to do to make a difference.

Jim Collins said that the enemy of great is being good, and that is precisely why we have so few things and institutions that are truly great. We need to push, we need to engage, and we need to help others realize that they, too, have the *capability* to lead.

And then we can only hope that they *choose* to lead.

Enjoy the journey.

Paul Pyrz
President, LeaderShape

INTRODUCTION

INNOVATIVE LEADERSHIP

Leadership and innovation are two of the most compelling topics in business today. Yet despite the volume of resources exploring both topics, most approaches provide directional solutions that are merely anecdotal and lack sufficient information to actually allow leaders to make measurable change. We know that leadership plays a critical role in an organization's long-term success, and that innovation has become a strategic necessity in today's business environment. In short, both leadership and innovation have a greater impact today than ever before. Technology and increased access to information continue to accentuate their roles, yet organizations are often too overrun with change to handle the torrent of emerging demands.

Still, ensuing questions on how to lead and where to innovate remain puzzlingly philosophical: What is the role of leadership in a time of looming uncertainty? How will organizations innovate to overcome challenges that are largely unprecedented? In a new climate of business, what is the formula for creating success in both areas?

This workbook is designed to help answer those questions and help you to perform the critical self-evaluation needed to refine and innovate your own leadership skills. It is fundamentally about leadership, yet equally an account of applying innovation. Leadership needs innovation the way innovation demands leadership, and, by marrying the two, you can improve your capacity for growth and improved effectiveness.

This workbook explores a number of approaches to elaborate on both areas, not just conceptually, but tangibly, by providing exercises designed to enhance your leadership skills. Most importantly, any meaningful advancement concerning both must originate from you. In other words, becoming a better leader and optimizing innovation jointly hinge on your ability to authentically examine your own inner makeup, which will allow you to make real change.

At the same time, you must diligently address some challenging limitations. Despite their collective value, many conventional applications of leadership and innovation have often proven elusive and even problematic in real-world scenarios. For example, if the leadership team of a struggling organization drives initiatives that focus solely on making innovative changes to incentives, products, and services, without also advancing strategic purpose, culture, and team cohesiveness, they will ultimately miss the greater potential to create a meaningful turn-around in the organization. Productivity and system improvements are undoubtedly critical, but how employees make sense of their work experience is equally vital to team engagement and commitment. Innovating products and improving functionality—without also creating a better team environment or a more supportive organizational culture—often appears to pay off in the short term, yet produces lopsided decision-making and shortsighted leadership that have lasting adverse consequences.

Knowing that the future of organizations is irrevocably tied to a world of erratic change, we can no longer afford to improve our systems and offerings without equally advancing our leadership capacity. Leadership empathy and the ability to inspire cultural alignment, along with other important leadership activities, will make a significant impact on your organization and must be implemented as shrewdly as strategic planning.

Combining leadership with innovation, then, requires you to transform the way you perceive yourself, others, and your business. By vigorously looking into your own experience, including motivations, inclinations, interpersonal skills, and proficiencies, you can optimize your effectiveness in the current dynamic environment. Through deep examination and reflection, you learn to balance the hard skills you have acquired with meaningful introspection, all the while setting the stage for further growth. In essence, you discover how to strategically and tactically innovate leadership the same way you innovate in other aspects of your business.

Marrying Innovation and Leadership

Let's explore innovating leadership in a more tangible way by defining it in practical terms. This, of course, begs the obvious question: *what does innovating leadership really mean?*

It is important to first understand each topic beyond its more conventional meaning. For example, most definitions of leadership alone are almost exclusively fashioned around emulating certain kinds of behaviors: leader X did "this" to achieve success, and leader Y did "that" to enhance organizational performance.

Even if initially useful, such approaches are still, essentially, formulas for *imitating leadership*, and are therefore likely ineffectual over the long term. Innovating leadership cannot be applied as a monolithic theory, or as simple prescriptive guidance. It must take place through your own intelligence and stem from your own unique sensibilities.

In order to enhance this unique awareness process you will need a greater foundational basis from which to explore both topics, which means talking about them in a different context entirely.

Let's start by straightforwardly defining leadership:

Leadership is a process of influencing people strategically and tactically, affecting change in intentions, actions, culture, and systems.

Within this context, and above all else, leadership involves a ***process of influence***: *strategic* influence to inspire vision and direction; *tactical* influence to guide functional execution.

Leadership influences individual intentions and cultural norms by inspiring purpose and alignment. It equally influences an individual's actions and organizational efficiencies through tactical decisions.

Innovation, as an extension of leadership, refers to the novel ways in which we advance that influence personally, behaviorally, culturally, and systematically throughout the organization.

Innovation is a novel advancement that influences organizations: personally, behaviorally, culturally, and systematically.

Notice here that in addition to linking the relationship of leadership to innovation, we're also relating to them as an essential part of our individual experience. Just as with leadership and innovation, the way you uniquely experience and influence the world is defined through a mutual interplay of personal, behavioral, cultural, and systematic events. These same core dimensions that ground leadership and innovation also provide a context and mirror for *your total experience* in any given moment or on any given occasion.

Optimally then, leadership is influencing through an explicit balancing of those core dimensions. Innovation naturally follows as a creative advancement of this basic alignment. In our experience, leadership and innovation are innately connected and share a deep commonality.

Therefore, marrying leadership with innovation allows you to ground and articulate both in a way that can create a context for dynamic personal development—and dynamic personal development is required to lead innovative transformative change.

Innovating leadership means leaders influence by *equally* engaging their personal intention and action with the organization's culture and systems.

Though we are, in a sense, defining innovative leadership very broadly, we are also making a distinct point. We are saying that the core aspects that comprise your experience—whether intention, action, cultural, or systematic—are inextricably interconnected. If you affect one aspect, you affect them all.

Innovative leadership is based on the recognition that these four dimensions exist simultaneously in all experiences and already influence every interactive experience we have. So if, for example, you implement a strategy to realign an organization's value system over the next five years, you will also affect personal motivations (intentions), behavioral outcomes, and organizational culture. Influencing one aspect—in this case, functional systems—affects the other aspects, since all four dimensions mutually shape that given occasion. To deny the mutual interplay of any one of the four dimensions misses the full picture. You can only innovate leadership by addressing reality in a comprehensive fashion.

Leadership innovation happens naturally and can be accelerated through the use of a structured process involving your own self-exploration, allowing you to authentically enhance your leadership beyond tactical execution.

To summarize, leadership innovation is the process of improving leadership that allows already successful leaders to raise the bar on their performance and the performance of their organizations.

An innovative leader is defined as someone who consistently delivers results using:

- **Strategic leadership** that inspires individual intentions and *goals* and organizational *vision and culture*;
- **Tactical leadership** that influences an individual's *actions* and the organization's *systems and processes*; and,
- **Holistic leadership** that aligns all core dimensions: *individual intention and action, along with organizational culture and systems*.

The Opportunity of Innovative Leadership

The overwhelming focus of today's organizational changes is on system functionality. Though necessary, it is only *part* of your total picture. Being guided by more strategically inclusive decisions may be the difference between managing failure and creating tangible success. Your leadership must consider a more balanced definition of innovation that comprehensively aligns vision, teams, and systems, and integrates enhanced leadership perspective with system efficiency.

This balanced approach to leadership and innovation is transformative for both you and your organization, and can help you to respond more effectively to challenges within and outside the enterprise. Innovating your leadership gives you the means to successfully adapt in ways that allow optimal performance, even within an organizational climate fraught with continual change and complexity. Conceptually, it synthesizes models from developmental, communications, and systems theories, delivering better insight than singular approaches. Innovative leadership gives you the capacity to openly recognize and critically examine aspects of yourself, as well as your organization's culture and systems, in the midst of any circumstance.

Defining What an Innovative Leader Does

What are specific behaviors that differentiate an innovative leader from a traditional leader? In this time of rapid business, social, and ecological change, a successful innovative leader is one who can continually:

- Clarify and effectively articulate vision
- Link that vision to attainable strategic initiatives
- Develop himself and influence the development of other leaders
- Build effective teams by helping colleagues engage their own leadership strengths
- Cultivate alliances and partnerships
- Anticipate and aggressively respond to both challenges and opportunities
- Develop robust and resilient solutions
- Develop and test hypotheses like a scientist
- Measure, learn, and refine on an ongoing basis

To further illustrate some of the qualities of innovative leadership, we offer this comparison between traditional leadership and innovative leadership:

TRADITIONAL LEADERSHIP	INNOVATIVE LEADERSHIP
Leader is guided primarily by desire for personal success and peripherally by organizational success	Leader is humbly guided by a more altruistic vision of success based on both performance and the value of the organization's positive impact
Leadership decision style is "command and control;" leader has all the answers	Leader leverages team for answers as part of the decision-making process
Leader picks a direction in "black/white" manner; tends to dogmatically stay the course	Leader perceives and behaves like a scientist: continually experimenting, measuring, and testing for improvement and exploring new models and approaches
Leader focuses on being technically correct and in charge	Leader is continually learning and developing self and others
Leader manages people to perform by being autocratic and controlling	Leader motivates people to perform through strategic focus, mentoring and coaching, and interpersonal intelligence
Leader tends to the numbers and primarily utilizes quantitative measures that drive those numbers	Leader tends to financial performance, customer satisfaction, employee engagement, community impact, and cultural cohesion

Getting the Most from the Workbook

Before you get started, take a moment to think about why you purchased this workbook. Setting goals and understanding your intentions and expectations about the exercises will help you focus on identifying and driving your desired results.

In order to help clarify, consider the following questions:

- What are the five to seven events and choices that brought you to where you are professionally and personally?
- How did these events and choices contribute to choosing to buy and use this workbook?
- What stands out in the list you have made? Are there any surprises or patterns?
- What do you hope to gain from your investment in leadership development?
- What meaningful impact will it produce in your professional career and personal life?

In addition to your reflection on the above questions, here are some ideas we recommend to help you get the most out of this experience. It is our observation that people who adhere to the following

agreements tend to have a deeper and more enriching overall experience. By participating in this fashion, you will generate a richer evaluation of yourself and most effectively take advantage of what this workbook has to offer.

Take a moment to reflect on the guidelines:

AGREEMENT	RELATED ACTION OR BEHAVIOR
1. Be fully present	Let go of thoughts about other activities while you read. Bring your full attention to the work
2. Take responsibility for your own success	Be 100% responsible for the outcome of your engagement with this material
3. Participate as fully as possible	Complete all the exercises to the best of your abilities. Apply the concepts and skills that work best for you, and modify those that do not
4. Practice good life management	Invest time at scheduled intervals to work on the materials when you are mentally and emotionally at your best
5. Lean into optimal discomfort; take risks without overwhelming yourself	Be candid, open, and direct. Allow yourself to be curious and vulnerable
6. Take the process seriously, and more importantly take yourself lightly. Make this a positive and rewarding experience	Allow yourself balance. Find the lesson and humor in both your successes and mistakes. Most importantly, have fun!

How to Use the Workbook

After this introduction to innovative leadership, each subsequent chapter builds on a series of exercises and reflection questions designed to guide you through the process of developing your own abilities as an innovative leader. We recommend that you use the following sequence to help efficiently process the material:

1. Read Intently

Read through the chapter completely, as we introduce and illustrate an integrated set of concepts for each element in building innovative leadership.

2. Contemplate

Using a set of carefully chosen applications and specifically designed exercises will help you to embody the work and bring the concepts to life. Through a process of dynamic examination and reflection, you will be encouraged to contemplate some significant, real-life implications of change. Many of the exercises can be done on your own; others are designed to be conducted with input from your colleagues.

3. Link Together Your Experience

As you sequentially build your understanding, you will begin noticing habits and conditioned patterns that present you with clear opportunities for growth. Though you may encounter personal resistance along the way, you will also discover new and exciting strengths. As you become more adept at using these ideas, you will find yourself increasingly capable of proactive engagement with the concepts, along with an ability to respond to situations requiring innovative leadership with greater capacity.

Once you have completed the process, you will have created a plan to grow as an innovative leader. Ultimately, implementing that plan will be up to you and your team.

Innovative Leadership Assessment



Following is a short self assessment to help you identify your own innovative leadership scores. It is organized by the five domains of innovative leadership and will give you a general sense of where to focus your efforts to improve your innovative leadership and managerial capacity. As you progress through the book, you will find information on the full assessments if you are interested in a more in-depth and thorough analysis of your current capacity.

We encourage you to take this assessment as a way to get a snapshot of where you excel and where you may want to focus your developmental activities and energies.

Score Yourself on Awareness of Leader Type and Self-Management



Think about your level of response to work situations over the past year and answer the following questions using this scale:

Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | | | | | |
|--|---|---|---|---|---|
| 1. I have taken a leadership type assessment such as the Enneagram, Myers-Briggs Type Indicator or DISC, and used this information about myself to increase my effectiveness. | 1 | 2 | 3 | 4 | 5 |
| 2. I use the insight from this assessment to understand my type—specifically, I understand my gifts and limitations, and try to leverage my strengths and manage my limitations. | 1 | 2 | 3 | 4 | 5 |
| 3. I have a reflection practice where I understand, actively monitor and work with my “fixations” (a fixation is a negative thought pattern). | 1 | 2 | 3 | 4 | 5 |
| 4. I have a clear sense of who I am and what I want to contribute in the world. | 1 | 2 | 3 | 4 | 5 |
| 5. I manage my emotional reactions to allow me to respond with socially appropriate behavior. | 1 | 2 | 3 | 4 | 5 |
| 6. I am aware of what causes me stress and actively manage it. | 1 | 2 | 3 | 4 | 5 |
| 7. I have positive coping strategies. | 1 | 2 | 3 | 4 | 5 |
| 8. I actively seek ways to feel empowered even when the organization may not. | 1 | 2 | 3 | 4 | 5 |

Total Score

- If your overall score in this category is 24 or less, it’s time to pay attention to your leadership type and self management.
- If your overall score in this category is 25–31, you are in the healthy range, but could still benefit from some focus on your leadership type and self-management.
- If your overall score is 32 or above, Congratulations! You are self-aware and using your leadership type to increase your effectiveness.

Score Yourself on Developmental Perspective Aligned with Innovation



Think about your level of response to work situations over the past year and answer the following questions using this scale:

Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|--|-----------|
| 1. I have a sense of life purpose and do work that is generally aligned with that purpose. | 1 2 3 4 5 |
| 2. I am motivated by the impact I make on the world more than on personal notoriety. | 1 2 3 4 5 |
| 3. I try to live my life according to my personal values. | 1 2 3 4 5 |
| 4. I believe that collaboration across groups and organizations is important to accomplish our goals. | 1 2 3 4 5 |
| 5. I believe that getting business results must be balanced with treating people fairly and kindly as well as have an impact on our customers and community. | 1 2 3 4 5 |
| 6. I seek input from others consistently to test my thinking and expand my perspective. | 1 2 3 4 5 |
| 7. I think about the impact of my work on the many elements of our community and beyond. | 1 2 3 4 5 |
| 8. I am open and curious, always trying new things and learning from all of them. | 1 2 3 4 5 |
| 9. I appreciate the value of rules and am willing to question them in a professional manner. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 27 or less, it's time to pay attention to your developmental level including testing your current level and focusing on developing in the area of developmental perspectives.
- If your overall score in this category is 28–35, you are in the healthy range, but could still benefit from some focus on developing in the area of developmental perspectives.
- If your score is 36 or above, Congratulations! Your developmental level appears to be aligned with innovative leadership, yet this assessment is only a subset of a full assessment.

Score Yourself on Resilience



Think about your level of response to work situations over the past year and answer the following questions using this scale:

Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | | | | | |
|---|---|---|---|---|---|
| 1. I consistently take care of my physical needs such as getting enough sleep and exercise. | 1 | 2 | 3 | 4 | 5 |
| 2. I have a sense of purpose and get to do activities that contribute to that purpose daily. | 1 | 2 | 3 | 4 | 5 |
| 3. I have a high degree of self-awareness and manage my thoughts actively. | 1 | 2 | 3 | 4 | 5 |
| 4. I have a strong support system consisting of a healthy mix of friends, colleagues, and family. | 1 | 2 | 3 | 4 | 5 |
| 5. I can reframe challenges to find something of value in most situations. | 1 | 2 | 3 | 4 | 5 |
| 6. I build strong trusting relationships at work. | 1 | 2 | 3 | 4 | 5 |
| 7. I am aware of my own self-talk and actively manage it. | 1 | 2 | 3 | 4 | 5 |
| 8. I have a professional development plan that includes gaining skills and acquiring additional perspectives. | 1 | 2 | 3 | 4 | 5 |

Total Score

- If your overall score in this category is 24 or less, it's time to pay attention to your resilience.
- If your overall score in this category is 25–31, you are in the healthy range, but could still benefit from some focus on resilience.
- If your score is 32 or above, Congratulations! You are likely performing well in the area of resilience, yet this assessment is only a subset of the full resilience assessment.

Score Yourself on Managing Alignment of Self and Organization



Think about your level of response to work situations over the past year and answer the following questions using this scale:

Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|---|------------------|
| 1. I am aware of my own passions and values. | 1 2 3 4 5 |
| 2. My behavior consistently reflects my goals and values. | 1 2 3 4 5 |
| 3. I feel safe pushing back when I am asked to do things that are not aligned with my values. | 1 2 3 4 5 |
| 4. I am aware that my behavior and decisions as a leader have an impact on the people I work with (even if I am not directly managing people). | 1 2 3 4 5 |
| 5. I am deliberate about aligning my behaviors with the behaviors the organization values and I pay attention to delivering the desired results (both results and behaviors). | 1 2 3 4 5 |
| 6. I am aware of how my values align with those of the organization and where they are misaligned; if there are misalignments, I try to find constructive ways address these differences. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 18 or less, it's time to pay attention to your alignment with the organization and also the alignment of culture and systems within the organization that you are able to impact.
- If your overall score in this category is 19–23, you are in the healthy range, but could still benefit from some focus on alignment.
- If your score is 24 or above, Congratulations! You are well-aligned with the organization and the organization's culture and systems are well-aligned.

Score Yourself on Leadership Behaviors



Think about your level of response to work situations over the past year and answer the following questions using this scale:

Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | | | | | |
|--|---|---|---|---|---|
| 1. I tend to be proactive – I anticipate what is coming next and actively manage it. (This may be primarily in my personal life.) | 1 | 2 | 3 | 4 | 5 |
| 2. I focus on creating results in a way that helps me grow and develop along with those who work for me while accomplishing our tasks. | 1 | 2 | 3 | 4 | 5 |
| 3. I think about the impact of my actions on the organization rather than just getting the job done. | 1 | 2 | 3 | 4 | 5 |
| 4. I see how my work contributes to organizational success. | 1 | 2 | 3 | 4 | 5 |
| 5. I deliberately try to improve myself and the organization. | 1 | 2 | 3 | 4 | 5 |
| 6. I take time to mentor others, even when I am busy (this could be formal or informal mentoring). | 1 | 2 | 3 | 4 | 5 |
| 7. I consider myself a personal learner because of the time I spend reading and trying new ideas and activities. I am curious. | 1 | 2 | 3 | 4 | 5 |
| 8. I have the courage to speak out in a professional manner when asked to do something with which I disagree. | 1 | 2 | 3 | 4 | 5 |
| 9. I accomplish results by working with and through others in a positive and constructive manner. | 1 | 2 | 3 | 4 | 5 |

Total Score

- If your overall score in this category is 27 or less, it's time to pay attention to your leadership behaviors and look for ways to develop in alignment with your goals.
- If your overall score in this category is 28–35, you are in the healthy range, but could still benefit from some focus on your leadership behaviors.
- If your score is 36 or above, Congratulations! You are likely performing well in the area of leadership behaviors, but this assessment is only a subset of a full leadership behavior assessment.

CHAPTER 1

Elements of Innovative Leadership

In this chapter, we'll start with a discussion of innovative leadership that provides the general framework for innovating how you lead, then we'll go into what emerging leaders do in chapter two. Innovative leadership comprises the five elements presented and discussed below; these are then applied throughout the balance of the book.

Figure 1-1 Five Elements of Innovative Leadership



The five elements of innovative leadership are reflected in Figure 1-1.

What is truly unique in this approach to leadership is the overall comprehensiveness of the model. Theorists have looked at each of these elements separately for many years, and have suggested that mastering one or two of them is typically sufficient for effective leaders. We believe that while that may have been true in a less complex world,

it is no longer the case. As the twenty-first century unfolds, the most effective leaders will need a much more holistic view than at any other time in history. In the following chapter, we will define and describe each individual element of innovative leadership and how they interact.

Leader Type

Part of the challenge in innovating leadership is learning to become more introspective and putting that introspective knowledge into practice. Looking inside yourself, examining the make-up of your inner being, enables you to function in a highly grounded way, rather than operating from the innate biases that lead to uninformed or unconscious decision-making.

First and foremost, when thinking about leadership, start by simply considering your disposition, tendencies, inclinations, and ways of thinking and acting. Innovating leadership hinges on understanding the simple manner in which you live in your life. One way to observe this is by examining aspects of your inner being, often called leader type, which reflect the leader's personality type. The Leader Personality Type (referred to going forward as Leader Type) has a critical influence on who you are as a leader. It is an essential foundation of your personal make-up and greatly shapes your leadership effectiveness. The ancient adage of "know thyself," attributed to various Greek philosophers, holds true as a crucial underpinning in leadership performance.

Your ability to use deep introspection relies on your development of a capacity for self-understanding and self-awareness. Both allow you to expand your perspective as well as build a greater understanding of others. These critical traits associated with leader type support a leader's abilities to manage self, communicate effectively with others, and encourage personal learning. You can use your understanding of your leader type (understanding yourself and others) as a powerful tool in effective leadership.

It is important to keep in mind that this particular notion of type is something that is native to your being and generally does not change significantly over the course of your life. This is an essential point: by understanding your type, as well as that of others around you, you can begin to see situations without the bias of your own perceptions. You have a clearer understanding, and can thus make more informed decisions with less speculation. You learn to deeply understand the inner movements of your strengths, weaknesses, and core patterns. Leadership typing tools are helpful in promoting this kind of self-knowledge and pattern recognition.

By learning about these patterns, you can gain perspective on your life and start connecting the dots among your different experiences. Most of us have a concept about how we behave, but that idea is likely clouded and not entirely true. One of the hardest things for most people is to see themselves accurately. How astonishing it is to see through the clouds and recognize yourself clearly.

— Roxanne Howe-Murphy, *Deep Living*

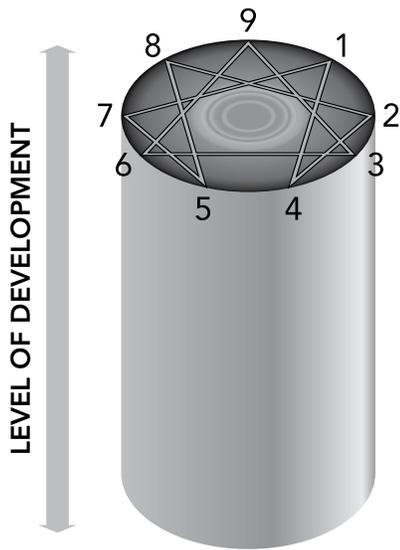
Learning at this deeper level from your own inner dynamics can offer remarkable insight into areas of your life that, in your own personal experience, you may either exaggerate or under emphasize.

Self-awareness and the capacity for self-management are foundational to innovative leadership and overall leadership effectiveness. By becoming aware of your inherent gifts as well as those of others, you are able to improve your personal effectiveness and that of the teams and departments with which you work.

Developmental Perspective

In this workbook we will be talking about ***developmental levels and perspectives*** as a core element in developing innovative leadership. Developmental perspectives significantly influence how you see your role and function in the workplace, how you interact with other people, and how you solve problems. The term *developmental perspective* can be described as “meaning making” or how you make meaning or sense of experiences. This is important because the algorithm you use to make sense of the world influences your thoughts and actions. Incorporating these perspectives as part of your inner exploration is critical to developing innovative leadership. In his best-selling business book *Good to Great*, author Jim Collins refers to Level 5 Leadership as an example of developmental perspectives applied to leadership. While we do not cover the relationship of Level 5 Leadership to developmental perspectives in this workbook, you can find more information on this subject in the *Innovative Leadership Fieldbook*.

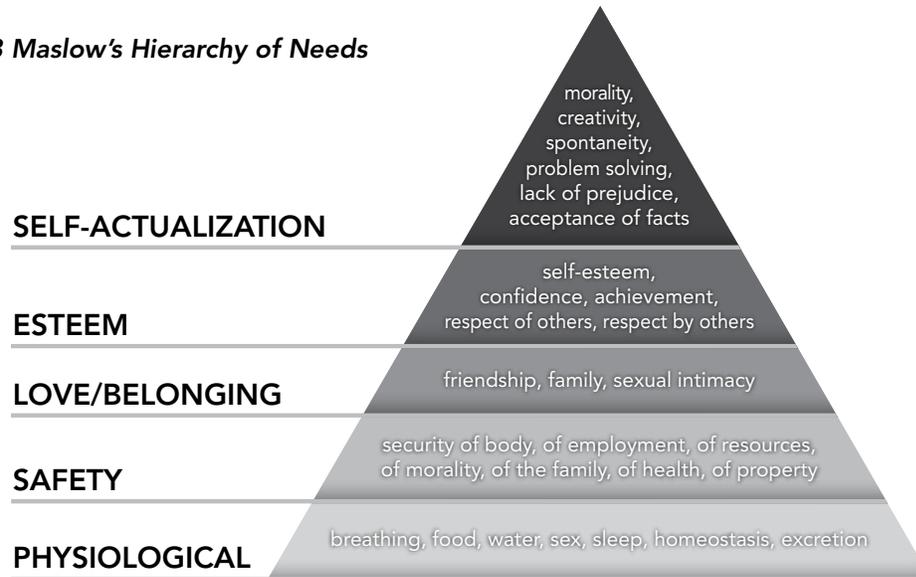
Figure 1-2 Enneagram & Developmental Perspectives



In order to connect developmental perspective with leader type, let's look at how these models come together. While leader type is generally constant over your life, you have the capacity to grow and develop your leadership perspective. In fact, leadership research strongly suggests that although your inherent leader type determines your tendency to lead, good leaders also develop over time. Therefore, it is often the case that leaders are perhaps both born and made. How leaders are made is best described using an approach that considers developmental perspective. Type remains consistent during your life while developmental perspective evolves. This is an important differentiator in leadership effectiveness and allows you to see what can be changed and what should be accepted as innate personality type.

We can also apply this model to the organizational level to help select and train leaders more effectively. Here are some additional benefits of using a model of developmental perspective:

- It guides leaders in determining their personal development goals and action plans using developmental perspectives as an important criteria.
- It is important to consider when determining which individuals and team members best fit specific roles.
- It helps in identifying high-potential leaders to groom for growth opportunities.
- It helps in the hiring process to determine individual fit for a specific job.
- It helps change agents understand the perspective of others and craft solutions that meet the needs of all stakeholders.

Figure 1-3 Maslow's Hierarchy of Needs

The developmental perspective approach is based on research and observation that, over time, people tend to grow and progress through a number of very distinct stages of awareness and ability. One of the most well-known and tested developmental models is Abraham Maslow's *hierarchy of needs*, a pyramid-shaped visual aid Maslow created to help explain his theory of psychological and physical human needs. As you ascend the steps of the pyramid you can eventually reach a level of self-actualization.

Developmental growth occurs much like other capabilities grow in your life. Building on your leader type, you continue to grow, increasing access to or capacity for additional skills. We call this “transcend and include” in that you transcend the prior level/perspective and still maintain the ability to function at that perspective. Let us use the example of learning how to run to illustrate the process of development. You must first learn to stand and walk before you can run. And yet, as you eventually master running, you still effortlessly retain the earlier, foundational skill that allowed you to stand and walk. In other words, you can develop your capacity to build beyond the basic skills you have now by moving through more progressive stages. It is also important to note that while individuals develop the ability to run, there are many times that walking is a much more appropriate choice of movement. The successful leader has a broad repertoire of behavior and is able to select the most appropriate one depending on the situation.

People develop through stages at vastly differing rates, often influenced by significant events or “disorienting dilemmas.” Those events or dilemmas provide opportunities to begin experiencing your world from a completely different point-of-view. The nature of those influential events can vary greatly, ranging from positive social occasions like marriage, a new job or the birth of a child to negative experiences, such as job loss, an accident or death of a loved one. These situations may often trigger more lasting changes in your way of thinking and feeling altogether. New developmental perspectives can develop very gradually over time or, in some cases, emerge quite abruptly.

Some developmentally advanced people may be relatively young and yet others may experience very little developmental growth over the course of their life. Adding to the complexity of developmental

growth is the fact that the unfolding of developmental perspectives is not predictably based on age, gender, nationality, or affluence. We can sense indicators that help us identify developmental perspective when we listen and exchange ideas with others, employ introspection, and display openness to learning. In fact, most people very naturally intuit and discern what motivates others as well as what causes some of their greatest challenges.

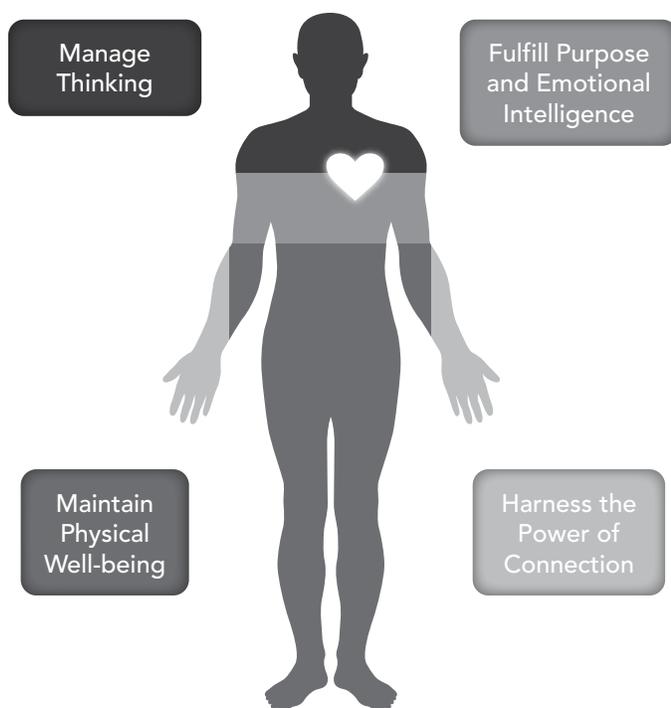
We believe a solid understanding of developmental perspectives is critical to innovating leadership and encourage you to delve into this concept in much greater detail. The purpose of this workbook is to introduce you to the concepts.

Resilience

There are two distinct ways to understand resilience. First, using an engineering analogy, resilience is viewed as how much disturbance your systems can absorb before a breakdown. This view highlights the sturdiness of individual systems. Second, from a leadership perspective, resilience can be viewed as the ability to adapt in the face of erratic change while continuing to be both fluid in approach and driven toward attaining strategic goals. The first definition reflects stability and the second refers to fluidity and endurance. Addressing all aspects of resilience is critical to optimizing it.

Among the elements essential to leadership, resilience is unique in that it integrates the physical and psychological aspects of leader type and developmental perspective to create the foundation of a leader's inner stability. This foundation enables you to demonstrate fluidity and endurance as you adapt to ongoing change.

Figure 1-4 Elements of Resilience



The underlying premise of resilience is that leaders need to be physically and emotionally healthy to do a good job. In addition to physical and emotional health, the resilient leader also has a clear sense of life purpose, strong emotional intelligence, an effective capacity to manage thinking, and strong supportive relationships. For most people, enhancing resilience requires a personal change.

Our model has four categories, shown in Figure 1-4. They are: maintain physical well-being, manage thinking, fulfill purpose using emotional intelligence, and harness the power of connection. These categories are interlinked, and all of them must be in balance to create long-term resilience.

Often, leaders we work with initially say they are too busy to take care of themselves. Finding the balance between self-care and meeting all of our daily commitments is tough. Most people fall short of their goals and over the longer term make choices for or against their resilience and personal health. Our message here is that creating and maintaining resilience is essential to your success. As you improve your resilience, you will think more clearly and have a greater positive impact in your interactions with others; investing in your resilience supports the entire organization’s effectiveness.

The following table provides questions for each of the four resilience categories to identify opportunities for improvement.

TABLE 1-1 KEYS TO BUILDING & RETAINING PERSONAL RESILIENCE	
<p>Manage Thinking</p> <p>Practice telling yourself:</p> <ul style="list-style-type: none"> ■ Challenges are normal and healthy for any individual or organization ■ My current problem is a doorway to an innovative solution ■ I feel inspired about the opportunity to create new possibilities that did not exist before 	<p>Fulfill Life Purpose</p> <p>Understand what you stand for. Maintain focus. Ask:</p> <ul style="list-style-type: none"> ■ What is my purpose? ■ Why is it important to me? ■ What values do I hold that will enable me to accomplish my purpose? ■ What opportunities do I have in my professional life that help me achieve my life purpose?
<p>Maintain Physical Well-being</p> <p>Are you getting enough:</p> <ul style="list-style-type: none"> ■ Sleep ■ Exercise ■ Healthy Food ■ Time in nature ■ Time to meditate & relax <p>Are you limiting or eliminating:</p> <ul style="list-style-type: none"> ■ Caffeine ■ Nicotine 	<p>Harness the Power of Connection</p> <p>Practice effective communication:</p> <ul style="list-style-type: none"> ■ Say things simply, and clearly ■ Make communication safe by being responsive ■ Encourage people to ask questions and clarify if they do not understand your message ■ Balance advocacy for your point with inquiring about the other persons’ points ■ When you have a different point of view, seek to understand how and why the other person believes what they do in a non-threatening way ■ When in doubt, share information and emotions ■ Build trust by acting for the greater good

Situational Analysis

Though much of the work of building innovative leadership is based on an in-depth examination of your personal and professional experience, understanding the background or context of that experience is equally important. Consider that your experience isn't merely a collection of personal expressions, events, and random happenstance; rather, it is fundamentally shaped by the background interplay of your individual attributes, shared relationships, and involved organizations.

Every moment of experience is influenced by a mutual interaction of self, culture, action, and systems. All four of these basic dimensions are fundamental to every experience we have. Situational analysis involves evaluating the four-dimensional view of reality shown in Figure 1-5. This comprehensive approach ensures that all dimensions are aligned, resulting in balanced and efficient action. We refer to these four dimensions as self, action, culture, and systems. This balance—without favoring elements—is an important skill for innovative leaders.

Leaders often take a partial approach to changing organizations. They over-emphasize systems change with little or no consideration to the culture or how their personal views and actions shape the content and success of the change. This multi-dimensional approach provides a more complete and accurate view of events and situations. Situational analysis enables you to create alignment across the four dimensions on an ongoing basis.

Figure 1-5- Integral Model



American-born philosopher Ken Wilber developed a conceptual scheme to illustrate the four basic dimensions of being that form the backbone of experience. His Integral Model provides a map that shows the mutual relationship and interconnection among four dimensions where each represents basic elements of human experience.

When you use situational analysis, you are cultivating simultaneous awareness of all four dimensions. Let's look at an example. This is a sample narrative taken from Integral Life Practice (Wilber et al) that will give you a more

experiential description of how these dimensions shape every situation in your life.

Example: "Visualize yourself walking into an office building in the morning..."

Self (Upper-Left Quadrant, "I"): You feel excited and a little nervous about the big meeting today. Thoughts race through your head about how best to prepare.

Culture (Lower-Left Quadrant, "We"): You enter a familiar office culture of shared meaning, values, and expectations that are communicated, explicitly and implicitly, every day.

Action (*Upper-Right, "It"*): Your physical behaviors are obvious: walking, waving good morning, opening a door, sitting down at your desk, turning on the computer, and so on. Brain activity, heart rate, and perspiration all increase as the important meeting draws nearer.

System (*Lower-Right, "Its"*): Elevators, powered by electricity generated miles away, lift you to your floor. You easily navigate the familiar office environment, arrive at your desk, and log on to the organization's intranet to check the latest sales numbers within the organization's several international markets.

In applying situational analysis to an organizational change, you would be aware of the four dimensions as referenced above and, when changing one, you would consider the impact on the others. If you get promoted and want to be perceived differently, how will you behave in the situation above? What will be different in all four dimensions as you walk into the office building?

A crucial part of innovating leadership is developing your capacity to be aware of all dimensions of reality in any given moment and identify misalignments. Even though you cannot physically see the values, beliefs, and emotions that strongly influence the way an individual colleague perceives himself and the world, nor a group's culture, emotional climate or collective perception, they still profoundly shape the vision and potential of leaders to innovate.

Situational Analysis is an innovative leadership tool that allows you not only to make more informed decisions, but also helps you optimize performance within yourself, your teams, and the broader organization. The alignment of all dimensions is the key to optimizing performance.

Leader Behaviors

Let's now shift our focus to the actionable craft of leadership. This section is as about observable leadership capability comprising hard skills and their associated behaviors. Leadership hard skills and behavior are critical to success, and serve as objective performance measures of innovative leadership.

Hard skills, knowledge, and aptitude fall into two primary categories: industry-related and functional. Leadership skills can be evaluated by observable behaviors and result from specific kinds of knowledge, skills, and aptitudes that are centered around leadership.

Thus, we use the term leadership behaviors in this workbook any time when referring to observable, actionable leadership traits. Both hard skills and leadership behaviors are critical to building innovative leadership. The balance between the importance of hard skills and leadership behaviors will shift as the leader progresses in the organization with leadership skills and behaviors becoming increasingly important with career advancement.

Leadership behaviors are important because they are the objective actions the leader takes that impact organizational success. We have all seen brilliant leaders behave in a manner that damages their organization and we have seen other leaders continually behave in ways that promote ongoing

organizational success. Effective leadership behaviors drive organizational success and, conversely, ineffective leadership behaviors drive organizational dysfunction or failure. Even the most functionally brilliant leader must demonstrate effective leadership behaviors to be successful when leading an organization.

To be successful, a leader must possess the hard skills in organizational administration to understand how the organization operates and the leadership behaviors to be able to effectively lead. If either of these sets of skills is missing, the leader and the organization are at risk of failure. Early in a leader's career, mastery of organizational leadership set him apart from his peers. As he progressed into senior leadership ranks and ultimately to the role of executive, his use of leadership behaviors became his primary focus while he never lost the need for hard skills; now, he relies on his functional and leadership skills to guide his direction and action.

There are different ways to discuss leadership from a skills perspective as demonstrated by Peter Northouse in his book on leadership.

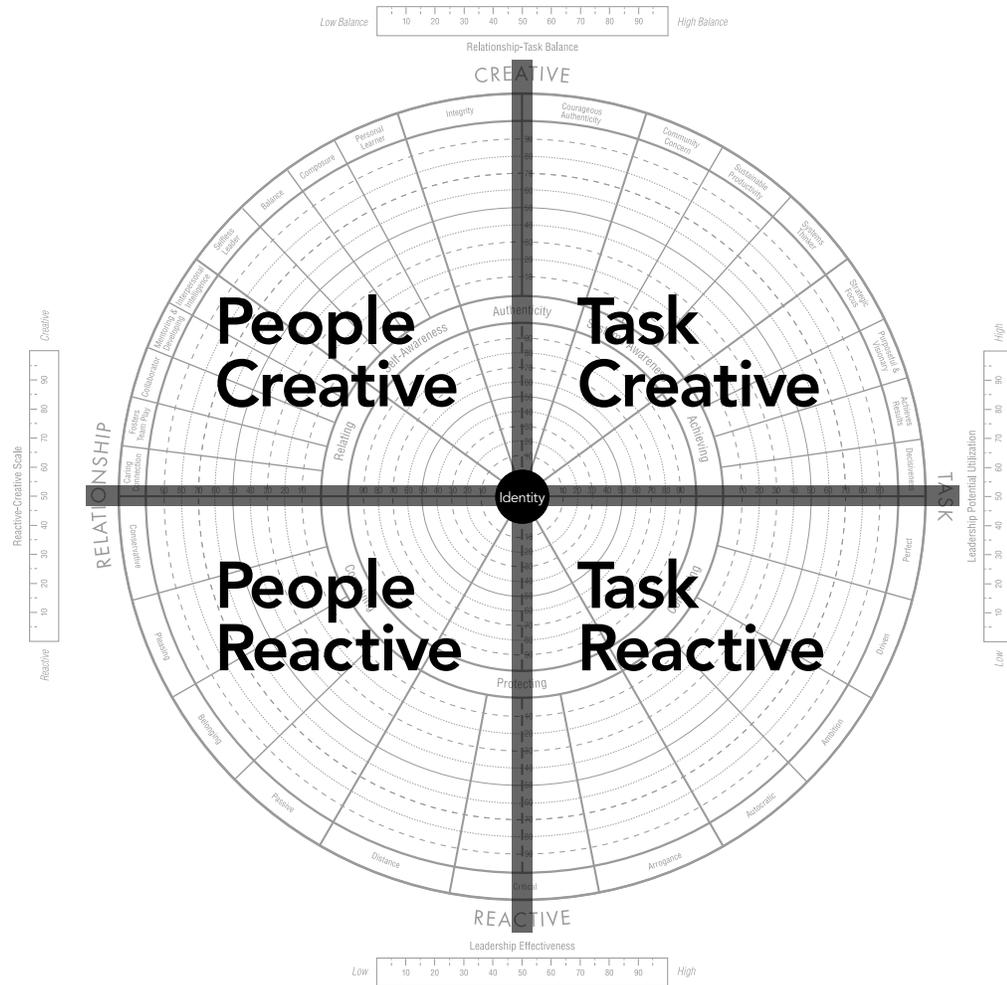
There are several strengths in conceptualizing leadership from a skills [actions] perspective. First, it is a leader-centered model that stresses the importance of the leader's abilities, and it places learning skills at the center of effective leadership performance. Second, the skills approach describes leadership in such a way that it makes it available to everyone. Skills are behaviors that we all can learn to develop and improve. Third, the skills approach provides a sophisticated map that explains how effective leadership performance can be achieved.

— Peter G. Northouse, *Leadership Theory and Practice*

As a leader, it is important to understand the key leadership behaviors important to you and your organization. With this understanding, you can determine where you excel and where you may want to refine your skills.

The Leadership Circle Profile (LCP) Behaviors

Figure 1-6- The Leadership Circle Profile



The Leadership Circle measures key dimensions of leadership shown in the inner circle in Figure 1-6. The sub-categories are shown in the outer circle (for reference go to www.theleadershipcircle.com) and can be broken into four key dimensions: people creative, task creative, people reactive, and task reactive. These four categories are created by drawing a line through the circle horizontally to separate the creative and reactive dimensions. The second line is drawn vertically to separate the people and task dimensions. The top of the circle behaviors are **creative behaviors**:

- Relating
- Self-awareness
- Authenticity
- Systems Awareness
- Achieving

These behaviors reflect proactive action which is referred to by the Leadership Circle as “Creative.” These behaviors reflect behaviors associated with setting strategic direction and inspiring people to accomplish goals.

The behaviors in the bottom half of the circle are **reactive behaviors**. They reflect inner beliefs that limit effectiveness, authentic expression, and empowering leadership. These dimensions reflect behaviors associated with following direction or reacting to circumstances as they arise rather than setting direction and creating the conditions for success.

The creative and reactive dimensions are then split on the vertical axis between people and task behaviors. People behaviors are associated with the actions leaders take to build themselves and their people such as relating and self-awareness. The task behaviors are actions leaders take associated with the work of running a business, such as systems awareness and achieving. The degree of emphasis on task versus relating will vary depending on your level within the organization, the overall organizational structure, and the organizational type. What is important to note is that leadership requires a balance of task-related behaviors along with relationship-related behaviors and this balance changes depending on the situation.

It is important to understand the behaviors associated with innovative leadership and also be able to flex your own leadership behaviors to match what is required by the organization. The most effective leaders and organizations demonstrate behaviors heavily weighted on the creative end of the scale. The balance between task and relationship will depend in part on the role of the leader within the organization. Strong leaders have the capacity to perform both people- and task-related roles well.

According to *The Leadership Circle Participant Profile Manual*, 2009 Edition published by The Leadership Circle, “These competencies [behaviors] have been well researched and [are] shown to be the most critical behaviors and skill sets for leaders.” Table 1-2 was adapted from *The Leadership Circle Participant Profile Manual*, 2009 Edition, published by The Leadership Circle.

TABLE 1-2 LCP DIMENSION DEFINITIONS	
Creative leadership behaviors listed below reflect key behaviors and internal assumptions that lead to high fulfillment, high achievement leadership.	
<p>The Relating Dimension measures leader capability to relate to others in a way that brings out the best in people, groups and organizations. It is composed of:</p> <ul style="list-style-type: none"> ■ Caring Connection ■ Fosters Team Play ■ Collaborator ■ Mentoring and Developing ■ Interpersonal Intelligence 	<p>The Self-Awareness Dimension measures the leader’s orientation to ongoing professional and personal development, as well as the degree to which inner self-awareness is expressed through high integrity leadership. It is composed of:</p> <ul style="list-style-type: none"> ■ Selfless Leader ■ Balance ■ Composure ■ Personal Learner

TABLE 1-2 LCP DIMENSION DEFINITIONS (CONT.)

<p>The Authenticity Dimension measures the leader's capability to relate to others in an authentic, courageous, and high integrity manner. It is composed of:</p> <ul style="list-style-type: none"> ■ Integrity ■ Authenticity 	<p>The Systems Awareness Dimension measures the degree to which the leader's awareness is focused on whole system improvement and on community welfare (the symbiotic relationship between the long-term welfare of the community and the interests of the organization). It is composed of:</p> <ul style="list-style-type: none"> ■ Community Concern ■ Sustainable Productivity ■ Systems Thinker
<p>The Achieving Dimension measures the extent to which the leader offers visionary, authentic, and high accomplishment leadership. It is composed of:</p> <ul style="list-style-type: none"> ■ Strategic Focus ■ Purposeful and Visionary ■ Achieves Results ■ Decisiveness 	

We will use these creative behaviors throughout the book as we refer to leadership behavior.

The next chapter will discuss emerging leadership in additional detail and talk about specific areas that are critical to success at the emerging leadership level.

Developing Innovative Leadership

Chapters three through seven walk you through the process of developing innovative leadership specifically for managers and emerging leaders. Each chapter reflects one step in the development process and includes tools, templates, questions for reflection, and an example of a person who has completed the process. It is the comprehensiveness of this reflection coupled with the exercises that will give you insight into yourself and your organization. This insight is required to change yourself and your organization concurrently or to manage your internal change in the context of an organization that you cannot or do not want to change. It is important to note that leadership development is an ongoing process. Upon completion of this process you will be more effective; yet, depending on your objectives, you may still want to continue developing. Figure 1-7 below shows the six steps in the process of innovative leadership development.

Figure 1-7 Leadership Development Process



While this process appears linear, we have found that when leaders work through these steps they often return to earlier parts of the process to clarify and sometimes change details they had originally thought were correct. The structure of our process will continue to challenge you to refine the work you have accomplished in prior tasks. First ideas are often good ones, but when you work with this tool you will continually find insight and discover new things. We encourage you to continue to test your ideas and feel comfortable going back in the process for further refinement.

The time you spend on the workbook is an investment in your development. If you are engaging deeply in the process it will likely take you three to six months or longer to complete. Whether managing personal and organizational change, or internal change alone in the context of an organization that you cannot or do not want to change, reflection and thorough evaluation are required. This reflection will take time and is critical to your growth. We strongly encourage you to engage in the process with as much time and attention as possible. The value you ultimately take from this process is closely linked to the time you invest.

REFLECTION QUESTIONS

What innovative challenges does your organization face?



How does your organization support effective leadership for innovation?



In which ways would you consider yourself an innovative leader?



How do you personally connect with leadership and innovation?



Where are the opportunities for you to be an innovative leader?



What would make you and your organization more effective in leading innovation beyond products, services, and systems?

CHAPTER 3

Step 1: Create a Compelling Vision of Your Future

The Innovative Leadership workbook is designed to provide a step-by-step process to support you in developing your own innovative leadership capacity. The fieldbook that serves as the foundation for this workbook has been tested with a broad range of clients, as well as with hundreds of working adults participating in an MBA program.



The comprehensiveness of these exercises coupled with reflection exercises will give you the insight into yourself and your organization needed to make substantive personal change. While this process appears linear, we have found that when leaders work through these steps, they often return to earlier parts of the process to clarify and sometimes refine their answers. The structure of our process will continue to challenge you to refine the work you have completed in prior exercises. First ideas are often good ones, yet when you work with this tool you will continually find insight. We encourage you to continue to test your ideas and feel comfortable circling back for further refinement.

These tools differ from many others by directing you through an exploration that takes into account your unique, individual experience while simultaneously considering the groups and organizations to which you belong.

The first step in starting your development process is cultivating a sense of clarity about your overall vision, which can also be summarized as your direction and aspirations. The intention behind your aspirations fuels both personal and professional goals, as well as provides a sense of meaning in your life. When your actions are aligned with your goals, they drive the impact you create in the world at large. As you move forward in the visioning process, we will guide you to begin thinking about individuals or groups who inspire or have a significant influence on you.

Simply put, your vision and aspirations help you decide where best to invest your time and energy, and clarifying them helps you define a manner of contributing to the world that authentically honors who you are. Your vision and aspirations further help you clarify what you want to accomplish over time. You can select the time span that resonates for you, whether short-term—one to five years—or perhaps a longer-term time horizon, such as the span of your lifetime. After clarifying your own unique, personal vision, you will have the foundation for your ensuing change process. Knowing your vision and values creates the basis for your goals, and can help you align your behavior with your aspirations.

As part of the visioning process, it is important to consider the context of your leadership role, your organization, and your employer. If you are clear about your personal vision, you can evaluate where and how you fit within that organization. On the other hand, if your vision differs significantly from what you do and how you work, the additional information will guide you in finding a role that is a better fit (this transition may not happen in the short term). By knowing your vision and aspirations, you are equipped with information that helps you align the energy you invest with the work you do.

In addition to creating a well-defined vision, it is also important to be clear about your motivation. The combination of vision and desire is what will enable you to maximize your potential. Without sufficient desire, solid vision, and understanding of your current capabilities, you are likely to struggle when progress becomes difficult.

Tools and Exercises

The exercises will guide you in identifying what is most important to you. First, you will define your future, and from that vantage point, clarify your vision and values. You will then consider what you want to do professionally, as well as the type and extent of the impact you want to have on the world.

It is important to note that many people will complete this exercise and still not have a clearly articulated vision—this is because defining personal vision requires a great deal of introspection for most people. While some people grow up knowing what they want to do for a living, others find that identifying a vision is a process of gradual exploration and will take more time and energy than completing a single workbook exercise. You will likely refine your vision as you progress through later chapters in the workbook, based on the information you learn about yourself. Because the visioning process is iterative in nature—a process of self-discovery—the exercises in this book will serve as the foundation for a longer process that may take considerably more time to complete. It will likely change as you gain experience and as your introspective process matures.

Define Personal Vision

Follow the steps defined below:

Step 1: Create a picture of your future. Imagine yourself at the end of your life. You are looking back and imagining what you have done and the results you have created.

- What is the thing of which you are most proud?
- If you had a family, what would they say about you?
- What did you accomplish professionally?
- What would your friends say about you?

For the rest of this exercise, let that future person speak to you and help you set a path that will enable you to look back with pride and say things like, “I feel fulfilled and at peace. I lived my life well.”

Step 2: Write a story. Now that you have that image of what you will accomplish, write a brief story about your successful life. Include details about the questions above. Make it a story of what you went through to accomplish each of the results for the questions you answered. What you are trying to create is a roadmap for your journey that gives you more insight into what you would want if you had the option to design your perfect life.

- Who helped you along the way?
- What did you enjoy about your daily life?
- Who was closest to you?
- What feelings did you have as you accomplished each milestone along the way?
- How did you mentor others and contribute to the success of others?
- What did you do to maintain your health?
- What role did spirituality or religion play in your journey?
- What job did you have?
- What role did material success play in your life?
- What type of person were you (kind, caring, driven, gracious)?

Step 3: Describe your personal vision. Given the story you have written and the qualities you demonstrated, write a two to five sentence life-purpose statement—a statement that talks about your highest priorities in life and your aspirations. This statement should capture the essence of how you want to live your life and project yourself.

An example - My vision is to develop myself to my greatest capacity and help others develop and thrive in all aspects of their lives. I will live consciously and courageously, relate to others with love and compassion, and leave this world better for my contribution.

Step 4: Expand and clarify your vision. If you are like most people, the choices you wrote are a mixture of selfless and self-centered elements. People sometimes ask, “Is it all right to want to be covered in jewels, or to own a luxury car?” Part of the purpose of this exercise is to suspend your judgment about what is “worth” desiring, and to ask instead which aspect of these visions is closest to your deepest desire. To find out, ask yourself the following questions about each element before going on to the next one: If I could have it now, would I take it?

Some elements of your vision don’t make it past this question. Others pass the test conditionally: “Yes, I want it, but only if...” Others pass, but are later clarified and distilled in the process. As you complete this exercise, refine your vision to reflect any changes you want to make.

After defining and clarifying your vision, it is time to consider your personal values. The combination of these two exercises will help you create the foundation of what you want to accomplish and the core principles that guide your actions as you work toward your vision.

Checklist for Personal Values

Values are deeply held views of what we find worthwhile. They come from many sources: parents, religion, schools, peers, people we admire, and culture. Many go back to childhood; others are taken on as adults. Values help us define how we live our lives and accomplish our purpose.

Step 1: Define what you value most. From the list of values (both work and personal), select the ten that are most important to you as guides for how to behave, or as components of a valued way of life. Feel free to add any values of your own to this list.

PERSONAL VALUES CHECKLIST

- Achievement
- Advancement and promotion
- Adventure
- Arts
- Autonomy
- Challenge
- Change and variety
- Community
- Compassion
- Competence
- Competition
- Cooperation
- Creativity
- Decisiveness
- Democracy
- Economic security
- Environmental stewardship
- Effectiveness
- Efficiency
- Ethical living
- Excellence
- Expertise
- Fame
- Intellectual status
- Leadership
- Location
- Love
- Loyalty
- Meaningful work
- Money
- Nature
- Openness and honesty
- Order (tranquility/stability)
- Peace
- Personal development/learning
- Pleasure
- Power and authority
- Privacy
- Public service
- Recognition
- Relationships
- Religion
- Reputation
- Security
- Self-respect
- Serenity

PERSONAL VALUES CHECKLIST (CONT.)

- Fast living
- Fast-paced work
- Financial gain
- Freedom
- Friendships
- Having a family
- Health
- Helping other people
- Honesty
- Independence
- Influencing others
- Inner harmony
- Integrity
- Sophistication
- Spirituality
- Stability
- Status
- Time away from work
- Trust
- Truth
- Volunteering
- Wealth
- Wisdom
- Work quality
- Work under pressure
- Other: _____

Step 2: Elimination. Now that you have identified ten values, imagine that you are only permitted to have five. Which five would you give up? Cross them off. Now cross off another two to bring your list down to three.

Step 3: Integration. Take a look at the top three values on your list.

- How would your life be different if those values were prominent and practiced?
- What does each value mean? What are you expecting from yourself, even in difficult times?
- Does the personal vision you've outlined reflect those values? If not, should your personal vision be expanded? Again, if not, are you prepared and willing to reconsider those values?
- Are you willing to create a life in which those values are paramount, and help an organization put those values into action?

Which one item on the list do you care most about?

Putting Vision into Action

After defining and clarifying your vision and values, the next step is to reflect on how to put them into action. You will consider the things you care about most as well as your innate talents and skills to determine what about your current life you would like to refine, or even change. You are probably passionate about specific interests or areas within your life; if you're really fortunate, you will have opportunities to participate in one or more of those areas.

The purpose of this exercise is to consider how best to incorporate your passions into how you make a living. You likely have passions that will always remain in the realm of hobbies; the main point of the exercise is to move closer to identifying your passions and expressing them in as many areas of life as possible.

In our experience, part of figuring out what you want to do is paying attention to what you find profoundly interesting. Those interests simply reveal themselves in the course of your daily interaction with peers and colleagues, and quite frequently at business functions. They are reflected in whatever you find yourself reading; they even display themselves in the context of more casual occasions, and are often seen in activities shared among friends.

This is the type of exercise that appears very simple on the surface, and may be something you revisit annually in order to refresh what is genuinely important to you. We find that revisiting allows you to nurture a sense of continual clarity about your direction. Iteration provides a mechanism for clarifying your direction as you grow and develop. With everything you try (false starts and all) you will discover a deeper truth about yourself that moves you closer to your most authentic passions. Some of those passions will be incorporated into your career; other passions help shape your personal life.

Exercise: Putting Vision into Action

Step 1: Identify your foundation. Answer the three questions below by compiling a list of responses to each.

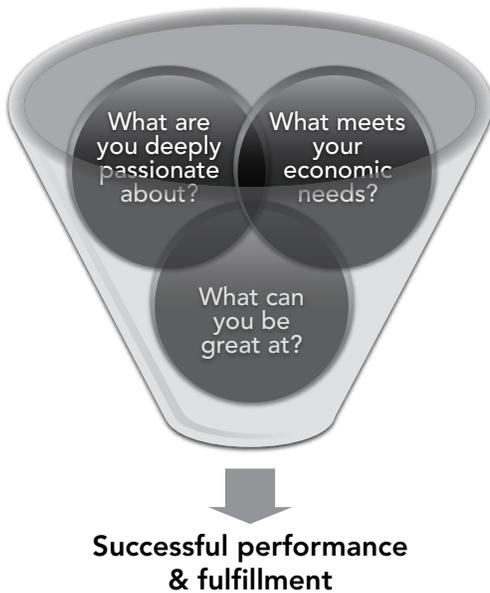
- What are you passionate about? This will come from the prior exercise and should now be relatively concise.
- What meets your economic needs?
- What can you be great at?

**Note - Your answers to these questions should reflect your values from the Personal Values Checklist.*

Step 2: Review and identify overlap. Review your answers and identify the overlaps.

Step 3: Harvest the ideas. Based on the overlaps, do you see anything that might be incorporated in what you do or how you work? This could mean adding an additional service line to an existing business or allocating a portion of your work time to a project that is aligned with your values.

An example of this is a client who, based on significant reflection, learned he valued giving back to the community in a way that he was not doing at the time. He was the CEO of a technology firm. His passion was offering computer training for returning veterans; he maintained the job of CEO and added a community support function into his business. His passion for service to the community and his professional skills afforded him the ability to follow his passion and still run a successful business. In the process of following his passion, he is building the workforce in his community and building his reputation as a civic leader and successful entrepreneur.



Vision-Based Actions

Innovative Leadership Reflection Questions

To help you develop your action plan, it is time to further clarify your direction using the reflection questions below. “What do I think/believe?” reflects your intentions. “What do I do?” questions reflect your actions. “What do we believe?” reflects the culture of your organization (i.e., work, school, community), and “How do we do this?” questions reflect systems and processes for your organization. This exercise is an opportunity to practice innovative leadership by considering your vision for yourself and how it will play out in the context of your life. You will define your intentions, actions, culture, and systems in a systematic manner.

Table 3-1 contains an exhaustive list of questions to appeal to a broad range of readers. You will likely find that a few of these questions best fit your own personal situation. Focus on the questions that seem the most relevant to you. We recommend you answer one to three questions from each category.

TABLE 3-1: QUESTIONS TO GUIDE THE LEADER AND ORGANIZATION

What do I think/believe?

- How do I see myself in the future? What trends do I see around me that impact this view? Have I considered how these trends impact the way I want to contribute?
- How does my view of myself impact me? Am I inspired by my vision? Terrified?
- How do I see myself within the larger environment? This can range from my family, the organization, to the global environment.
- After doing the exercises, what is my vision?
- After doing the exercises, what are my values? What do I stand for? What do I stand against?
- What are the connections between my business vision and my personal mission, passion, and economic goals?

What do I do?

- How do I gather input from key stakeholders to incorporate into my vision (family, business, self)?
- How do I research trends that will impact my industry so I can understand my future placement and how to navigate potential transitions in my industry?
- How do I synthesize competing goals and commitments to create a vision that works for me in the context of the communities I serve (family, friends, work, and community)?
- How do I develop my vision taking the greater economic conditions into account?
- What do I tell others about my vision? Do I have an “elevator speech”? Is it something I think is inspirational?

What do we believe?

- How does my personal vision fit within the larger context of my family, my community, my industry or my job?
- How do I create a shared belief that my vision will help the organization succeed within the larger community and also help the community succeed?
- What do we believe we stand for as an organization? How should we behave to accomplish what we stand for (guiding principles/values)? Do my values align with the organizational values?
- How do I reconcile differences between my values and those of my organization? How will these differences impact my ability to develop toward my vision and goals?

How do we do this?

- How do I monitor the organization’s impact on my vision? How do I honor my vision when helping define/refine the organizational vision?
- What is our process for defining/refining changes to our shared vision for the organization and other systems I function within? What is our process for clarifying and documenting our values? How do I ensure that my values are aligned with our guiding principles?
- Who gives me feedback on their perspective of my progress? How often? What form would I like this feedback to take?
- What measures help me determine progress toward my vision and values? How do I track and report progress toward these goals? Is my behavior supporting the organizational goals? Are the organizational goals supporting my goals?

Because there are many different ways to interact with the workbook, we have two case studies. Our emerging leaders have either answered different questions, or approached the exercises in slightly different ways to demonstrate the range of options for working with the exercises. We recommend you find the approach that best meets your needs and fits your style.

To help illustrate these reflection questions, we've included Jonathan's and Demetrius's answers. We have tried to capture their internal thought process in these exercises in a way that is rare in a business context, but helpful for the purpose of personal development.

Introduction to Jonathan

Jonathan graduated from the University of Urbana in 2011. He is a graduate of the LeaderShape program where he initially clarified his personal vision. He is founder and president of Illini Prosthetic Technologies (IPT) technologies which he started in 2008.

IPT's focus is to re-enable amputees around the world with simple, innovative, and affordable solutions. He now provides technical and business leadership to operations in Latin America, and interfaces IPT with hospitals, clinics, and NGOs working with amputees in Latin America.

Its goal is to disseminate its unique technology, and comparable technologies, to disadvantaged individuals around the world through partnerships with clinics and aid organizations active in all parts of the world to: provide solutions to disadvantaged individuals who previously have not had access to affordable care; increase the effectiveness of aid organizations operating in the developing world; and, create social value within the framework of a financially sustainable nonprofit.

Jonathan's Personal Vision Defined

Step 1: Create a picture of your future. Imagine yourself at the end of your life. You are looking back and imagining what you have done and the results you have created.

- **What is the thing of which you are most proud?** I am most proud of raising a family which is united and shares similar values to mine, while having spent my career improving the lives of others. I am at peace because I know where I have been, where I am, and where I am headed, and I know that my life was a genuine one.
- **If you had a family, what would they say about you?** They always completely felt my love for them, they loved being loved by me and loving me, and I taught them the core values that enabled them to live out their dreams. They will miss me a great deal after I am gone, but will use this emotion to become great people in their own lives.
- **What did you accomplish professionally?** I brought hope and results to a lot of people who lived with almost nothing, and who then went on to do the same thing for others. This was made possible through my founding of and leading a number of socially-minded organizations and movements.

- **What would your friends say about you?** They loved being with me, remember a lot of great experiences together, and were inspired by my life. They will also miss me a great deal when I am gone, but, like my family members, they will go out and do great things.

Step 2: Write a story.

- **Who helped you along the way?** I was helped by my faith, my family, my friends, my mentors, and my colleagues. I surrounded myself with people I knew would help me to make visions come true.
- **What did you enjoy about your daily life?** I most enjoyed being around the people I love and the people I care about, while constantly fighting for the people I wanted to help. I also enjoyed being able to work independently of the rigorous structure and societal expectations that come with a bureaucratic organization, and being able to diversify my efforts among many things which interested me. Every day was a new adventure which challenged me to be the best I could be and taught me new things.
- **Who was closest to you?** My wife, children, brothers, and parents were closest to me. My mentors and friends were also very close to me.
- **What feelings did you have as you accomplished each milestone along the way?** I felt incredibly excited about the human impact we (my team and I) had made, and was ready to start on my next project of making an impact in the lives of others. It was refreshing to switch into a new project every so often—this is what kept me sharp my entire career.
- **How did you mentor others and contribute to the success of others?** I mentored those who were in project teams with me to grow into leadership roles as I moved on to form new teams. Their success as future leaders in the organizations which I founded was equally important as was the metricized success of the organizations which they were leading. These leaders who I coached from peer co-founders to the future leaders of my organizations went on to form more organizations and perpetuate the founding-coaching-transition model. The ripples in the pond grew to affect a lot of people in very good ways.
- **What did you do to maintain your health?** I ate healthily, exercised regularly, and abstained from the things which I knew would degrade my health without good return. My relationships kept me accountable to this healthy way of life, and provided me with everything I needed emotionally. My continued education kept my mind developing throughout my career. My commitment to my faith kept my spirit renewed and refreshed every day of my life.
- **What role did spirituality or religion play in your journey?** My faith is the most important foundation in my life because it explains why I am in this world, how I should live and for what purpose, and where I am headed after I die. I attended religious services each week and maintained a daily routine of prayer and devotion in order to maintain spiritual health.
- **What job did you have?** I had the job of applying my social and technical passions to helping those in need around the world. This was manifested through my founding and leadership of a number of socially-minded organizations (both for-profit and nonprofit)

which collectively worked on a number of pressing social issues (healthcare, education, poverty, etc.).

- **What role did material success play in your life?** Material items played an extremely small role in my happiness. The only major things I spent major money on were: my children's education, my home, and traveling the world. Much of my money was invested into other socially-minded organizations that were doing work in which I believed.
- **What type of person were you (kind, caring, driven, gracious)?** I was a person who had his priorities straight and stayed true to his values. When I worked, I was an inspirational, innovative, and driven person who had an excellent rapport with others, but when I was not working I was a fun-loving, light-hearted family man.

Step 3: Describe your personal vision.

My vision was to spend my life making a positive impact on those who live in constant need, empowering them to do the same for others. I did this while building other visionaries who made their impact on the world, the most important of whom are the members of my family.

Step 4: Expand and clarify your vision.

My vision is to spend my life positively impacting those who live in constant need, empowering them to do the same for others. I will do this in a way that my family and I can emotionally and financially sustain, and, in the process, build my children and colleagues into great leaders who are also focused on human impact.

Jonathan's Checklist for Personal Values

Step 1: Define what you value most.

Relationship with my Creator; love for and from my family; honesty and trust in all parts of life; hope in people; longevity in relationships; physical and mental health; challenging, stimulating, and diversified work; family and work balance; learning and excellence in work; worldly view and experience.

Step 2: Elimination. Now that you have identified ten values, imagine that you are only permitted to have five. Which five would you give up? Cross them off. Now cross off another two to bring your list down to three.

(1) Spiritual relationship; (2) love for and from my family; (3) honesty and trust.

Step 3: Integration. Take a look at the top three values on your list.

- **How would your life be different if those values were prominent and practiced?** I would commit more time to my faith and to my family, even at the expense of the progress that I have every day in my work. I already practice honesty and trust in all aspects of my life.

- **What does each value mean? What do you expect from yourself, even in difficult times?** (1) My relationship with my Creator means an intimate spiritual connection, and my resulting way of life. I should be taking more time for daily prayer and devotion, and doing a better job of aligning my actions and strategy against the parameters of my faith. Though I am increasingly busy with my work, this should only increase the devotion I have to this value in my life. (2) My love for and from my family means that I am continually renewing and growing my relationships within my family (including my brothers, parents, grandparents, and significant other). I should be spending more time to connect with each person in my family, and to give them love and receive their love. Again, this should only increase in magnitude as time goes on. (3) My honesty and trust in all parts of life means that I am maintaining full integrity in all that I do professionally and personally. I feel like this is the value in which I am doing the best I can right now because, for me, this must be foremost in all things. I will never compromise this value and, thus, it remains at a high level of importance regardless how busy I am.
- **Does the personal vision you've outlined reflect those values? If not, should your personal vision be expanded? Again, if not, are you prepared and willing to reconsider those values?** My personal vision is built upon these values. My desire to serve others through my vision directly stems from my spiritual beliefs. This value also gives rise to my extremely high value on family and on integrity. My vision specifically discusses my desire to help others (and to help them help others), and it mentions that I want to train my family members to do the same. I should probably retool my vision statement to be more inclusive of my value of honesty and to include family more comprehensively than just training my family members to carry out a similar type of work. Because my values set my compass, I should reword my vision statement and not the values which have created it.
- **Are you willing to create a life in which these values are paramount, and help an organization put those values into action?** Without hesitation, yes.

Which one item on the list do you care most about?

If I need to list only one, my spiritual relationship is the value of highest importance to me.

Jonathan's Putting Vision into Action Exercise

Step 1: Identify your foundation. Answer the three questions below by compiling a list of responses to each.

- **What are you passionate about?** I am passionate about global problems and solutions (especially in regards to health), socially-minded organizations, employing science and engineering to solve problems, teaching others to make an impact, writing and speaking in public, my family life, my faith life, working and visiting new parts of the world.
- **What meets your economic needs?** I can make a solid living from becoming an expert on global health problems and solutions.

- **What can you be great at?** I can be really great at leading socially-minded organizations and efforts which are working to solve global health issues.

Step 2: Review and identify overlap. My answers to “what I can be great at,” “what meets my economic needs,” and “what am I passionate about” all line up very nicely with my revised vision statement. They all also implicitly involve the top three values I chose, as well as the original ten that I started with.

Step 3: Harvest the ideas. For me, this analysis is really a reaffirmation of the work I am currently doing with the nonprofit organization that I founded and for which I now work fulltime. This does give me solid direction for my personal future following my current mission with this organization, as I begin to apply to graduate schools in the field of public health and think about where I am headed in the five- to ten-year timeframe in my global health work. Looking at this is very important for me because it helps me to know what experiences I need to get prior to starting graduate school so that I can use that education to position myself in the niche of the global health community about which I am most passionate.

What do I think/believe?

- *How do I see myself in the future? What trends do I see around me that impact this view? Have I considered how these trends impact the way I want to contribute?*

In the future, I see myself as a constant social innovator. I have started and led a number of successful organizations focused on a set of global problems, and I already have an idea for the next organization which I will form to address a specific need. I continually see the new face of a problem which has not yet been solved, and I see new technological and business development that could be applied to that problem to solve it. I also see increased societal support for socially-focused innovation which continually feeds resources to these organizations.

What do I do?

- *How do I gather input from key stakeholders to incorporate into my vision (family, business, self)?*

I constantly surround myself with people who have knowledge and experience in the areas in which I am working, and use their input to reach decisions that I make within my organization and my life. I consider each person a mentor, and establish that fact from the first time that we meet so that they know how much their wisdom means to me and they are committed to the success of that which we discuss. It is important to get input from multiple sources and to remember that at times it will be conflicting. At the end of the day, the important thing is that I choose which input to follow, and that I never feel pressured to implement input that does not feel consistent with my vision.

What do we believe?

- *How does my personal vision fit within the larger context of my family, my community, my industry or my job?*

My life vision is currently manifested in the mission of my nonprofit organization, which is to produce and distribute prosthetic arms to amputees living in poverty. While this is the present manifestation of my vision, I know that it is only the current step in my lifelong journey to fulfill my vision. My family, friends, and community are very much supportive of how I am currently pursuing my vision, and so are the amputees and organizations that will benefit from using our prosthetic arm.

- *How do I create a shared belief that my vision will help the organization succeed within the larger community and also help the community succeed?*

I founded my organization based upon my original vision, and worked hard to inspire my business partners to take part in this vision and to share it with others. Each of my partners had different personal motivations to share in this vision, but each of us is united in a common end-goal. The organizations our nonprofit are partnered with also share in the common end-goal, as do their patients. While all parties approach goals in different ways, we all agree what the goal is and, thus, work together in the effort. This is shared belief in our vision on both team and community levels.

- *What do we believe we stand for as an organization? How should we behave to accomplish what we stand for (guiding principles/values)? Do my values align with the organizational values?*

We advocate for amputees who need our product, and the comprehensive process of developing, testing, manufacturing, and distributing the product which gets us there. Every organization providing the device to a patient is our top priority. A sub-value of that larger value is producing a quality product and providing a quality service. My personal values very much align with these organizational values because they focus on helping people.

- *How do I reconcile differences between my values and those of my organization? How will these differences impact my ability to develop toward my vision and goals?*

While my personal values or style can sometimes be slightly different than those of the organization, they are very similar; and, I would not have much interest working in an organization in which this was not the case. This alignment is present because I am the founder of the organization, and have instilled a lot of the current culture and values. This is a key advantage to founding one's own organization instead of assimilating into one, and it is the reason that founding an organization is often times the most efficient and accurate way to implement a personal vision. Although we work in the context of social service, it is very important that we look after our personal needs for enrichment and growth—this is sometimes hard to do with such a small staff that is so determined to accomplish a singular mission.

How do we do this?

- *Who gives me feedback on their perspective of my progress? How often? What form would I like this feedback to take?*

As mentioned above, I have a group of mentors with whom I meet on a regular basis to discuss professional and personal matters. They have all come to know me well enough that they can help me to evaluate tough decisions that I face in terms of my vision. My personal preference is to meet with at least one of my personal mentors once a week in person.

Introduction to Demetrius

At age 33, Demetrius, a successful senior project manager and former computer engineer, began an MBA program to expand his understanding of how businesses function and to grow his leadership skills. On a daily basis, he is involved in face-to-face communications with various stakeholders in addition to leading his teams through the ambiguity of project definitions to successfully deliver high-quality products to the sponsor and the organization.

Demetrius's Vision Development Process Vision of the Future

When I look into the future I want to be proud of the person I have become and the life that I have lived. In particular, I want to ensure that my wife and I have raised a beautiful family in which our children think independently and are able to articulate their own personal visions. I would like for my children to be able to say I have been there for them every step of the way, and allowing them to experience life while guiding them away from danger when possible. For me, family and family interactions are highly valued, so the closest people to me are my wife and our children. However, I don't discount the close friends I have known since high school and those I've met along the journey since college.

Professionally, I want to create an organization whose culture represents my personality: relaxed and laid back, yet focused and driven. I want to create a work environment in which people are excited about their work and where they can accomplish their professional goals. Finally, my organization must take into account our community and find ways to give back every chance we get.

Demetrius's Vision

My vision is to develop myself to my greatest capacity and create a healthy and loving environment in which my family will thrive. I strive to be a friend who can be counted on in every way. I will create a business that delivers value to our clients and community, and has a culture where people can thrive and grow personally.

Demetrius's Values

Top three values:

1. Family
2. Integrity
3. Humility

What do I think/believe?

- *How do I see myself in the future?* One thing I have always believed to be a constant in my life is that change is inevitable. As a leader, I believe it is my responsibility to my organization and to the teams that I lead to embrace and prepare for change. I see myself being the conduit to change that will enable growth for me, my family, and my peers, company, and community. I believe individuals are more willing to accept change if they have a roadmap to guide them. If I understand the potential risks and rewards associated with any forthcoming change, I can plan a course of action that will enable me to capitalize on the rewards, while mitigating or eliminating the risks. I also understand that I will not have an answer for everything, and when a situation arises I still need to stay levelheaded and forward-thinking to help guide the aforementioned groups through the process of change.
- *How does my view of myself impact me? Am I inspired by my vision? Terrified?* After completing my undergraduate degree in computer science engineering, I began reading a variety of books that I didn't pick up while in school. One such book was *Think and Grow Rich* by Napoleon Hill. In his book I found a common theme that has become the basis for many aspects of my life: A made up mind is the most powerful thing a person can have. So, am I inspired by my vision? Absolutely! I envisioned myself walking across the stage as a graduate, I envisioned contributing at a high level within my organization, I envisioned leading—and not simply managing—teams. In each vision I could see the impact it would have on me and the people around me. With each vision, I made up my mind that it was the right thing for me to do and I let that vision guide me to reach my goals.

At the same time, I am mindful that there is still a ton of growth and learning that I have to do in my career and in my personal life. I make it a point to learn from everyone around me and in each encounter that I have. Every individual has some knowledge that they can share—intentionally or not—if you take the time to listen.

- *How do I see myself within the larger environment? This can range from my family, the company, to the global environment?* As the father of a seven-month-old daughter, the way I see myself has completely changed because I am now the center of her world. Having a child puts a lot of environmental concerns into focus that I didn't necessary think too much about before she was born. I have always been a big believer in volunteerism and lending a hand, but I never

thought much about what the world would look like when my child was older. I now make more deliberate and conscious efforts to be a positive influence in my physical environment and have increased my volunteer activities.

What do I do?

- *How do I gather input from key stakeholders to incorporate into my vision (family, business, self)?*
I recently had a conversation with my wife about my vision for my career. In particular, do I continue to work toward becoming a ‘C’ level executive within an organization, or do I turn my attention to owning my own business. I have also spoken with colleagues and previous supervisors about their assessment of my strengths and weaknesses. I have asked these groups of individuals because I trust they will provide honest feedback—whether they may or may not agree with my own assessment of myself. While I’m not looking for them to make a decision for me, I do value their opinions and their viewpoints. At the end of the day, I will take time to internalize the information that I have received from them to formulate a plan of action, but the final decision will be made after some introspection.

- *How do I synthesize competing goals and commitments to create a vision that works for me in the context of the communities I serve (family, friends, work, and community)?*
For me this has been a constant dilemma. While I believe in putting my family above all else, I also know there are times that I have to put work first to create a better sense of stability for my family. The way I handle this is to envision the future I want for my family and set incremental milestones to achieve those goals. One such goal was going back to school and completing my MBA. This meant sacrifices on my wife’s part, but at the same time we knew that if I completed the program quickly it would have less of an impact on our family and a bigger reward in our future.

As part of setting those milestones, my wife and I periodically revisit them to see what is still relevant and make course corrections to ensure we are still on path, or, if need be, forge a new path.

What do we believe?

- *How does my personal vision fit within the larger context—my family, my community, my industry, my job?*

When I look at my industry, I begin to feel more and more confident that my personal vision is aligned with the visions of my industry. We have begun the transformation from managing people to leading people. The time has passed from command and control, to lead

and learn. There is more power in thinking and working as a group, as opposed to any one person feeling as if he needs to have all the answers. This is the vision I have working for an organization and leading an organization into the future.

My wife and I also share a vision as we move forward with our careers and our lives. The sharing of the vision is an important concept. Of course we are two different individuals with different goals, but the vision we share is in the support that we show each other. It's really important to each of us that we are each other's biggest supporter. Therefore, we make it a point to help each other to grow and to help each other to achieve individual personal goals.

■ *What do we believe we stand for as an organization?*

As an organization we stand for providing the best in value to our customer while maintaining integrity in the work that we produce. For me, there is a lot to be said about doing the "right thing." As an organization, of course, we are concerned about the bottom line, but not at the expense of doing something that our customers would deem unethical or not in their best interests. This is a type of organization that I can stand behind and I believe that we are headed in the right direction. At this point, I believe my values are becoming more closely aligned with our organizational values and this is a positive sign.

How do we do this?

■ *Who gives me feedback on their perspective of my progress? How often? What form would I like this feedback to take?*

I believe feedback comes in many forms and it comes on a daily basis. For example, when we conduct product reviews with our clients, I take a scan of the individuals to gain a general sense of the feeling within the room. Then, as the presentation comes to a close, I begin to listen to feedback. If I notice a look of concern or confusion, I make it a point to ask the individual about any concerns. This gives people an opportunity to voice any issues they have, and it gives me an opportunity to clear up any confusing points. The feedback given at these reviews is directed at the team, but it's also an indirect indication of the job that I'm doing.

I also use a more direct approach of simply asking for feedback on a regular basis. I'm a firm believer of not waiting until a yearly review to give feedback to members of my team, or to find out how I'm progressing. If you wait until the end of the year or you wait until your yearly review, it's too late to change something that happened six months earlier. However, if I am actively seeking feedback on a regular basis, I can make course adjustments and I have a better chance to correct the behavior before my annual review.

■ *What measures help me determine progress toward my vision and values? How do I track and report progress against these goals? Is my behavior supporting the organizational goals? Are the organizational goals supporting my goals?*

As a practicing project manager, I believe in periodically checking progress on my primary projects. The same is to be said about my vision, my values, and my goals. When it comes to my values, I'm constantly making sure that I'm staying true to them and take time to ensure that my values are still in line with my visions of the future. At the same time, I use my short- and long-term goals as stepping stones to the next portion of my vision of the future. I work to keep my values, short- and long-term goals aligned so that as I complete one set of goals and approach the next, I can start working on generating the next set of goals that are necessary to actualize my vision.

Your Process of Creating a Compelling Vision

Now that you have read Jonathan's and Demetrius's personal narratives, it is time to complete the exercises and answer the questions for yourself. We encourage you to complete all of the exercises. These exercises establish a strong foundation for your personal vision, values, and course of action, so exercise patience and give yourself time to explore your hopes and dreams as authentically as possible. You will know you've completed this step and are ready to move to the next when you feel you have created a vision and set of values that truly inspire you.

Throughout this chapter, we have discussed exercises that will help you clarify your life direction and create a compelling vision for your own life and work. The next chapter focuses on assessing where you are right now in your career and personal development.

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Author Bio

Maureen Metcalf

Maureen is the founder and CEO of Metcalf & Associates, Inc., a management consulting and coaching firm dedicated to helping leaders, their management teams and organizations implement the innovative leadership practices necessary to thrive in a rapidly changing environment.

Maureen is an acclaimed thought leader who developed, tested, and implemented emerging models that dramatically improve leaders and organizations success in changing times. She works with leaders to develop innovative leadership capacity and with organizations to further develop innovative leadership qualities.

Maureen is at the forefront of helping organizations to explore these emerging solutions for long-term organizational sustainability.

As a senior manager with two “Big Four” Management consulting firms for 12 years, Maureen managed and contributed to successful completion of a wide array of projects from strategy development and organizational design for start-up companies to large system change for well-established organizations. She has worked with a number of Fortune 100 clients delivering a wide range of significant business results such as: increased profitability, cycle time reduction, increased employee engagement and effectiveness, and improved quality.



Thank you for reading!

Thank you for taking the time to read the Innovative Leadership Workbook for Emerging Leaders and Managers.

I trust the worksheets and reflection questions you completed here will help you become a more effective leader. Because growth has a ripple effect dynamic, we welcome your suggestions, additional tools and templates. Please contact me at:

Maureen Metcalf
Metcalf & Associates, Inc.
Maureen@metcalf-associates.com

This is the third in a series of workbooks. Subsequent workbooks will be written for public service executives and more. Download other titles on Innovative Leadership at www.innovativeleadershipfieldbook.com.

Praise for the Innovative Leadership Workbook for Emerging Leaders and Managers

Part of a larger series that addresses various stages of development throughout one's career, the Innovative Leadership Workbook for Emerging Leaders and Managers lays out a process for individuals, early in their career to think about their development in the context of the organizational culture and systems. It also provides a host of tools to address different needs—a critical success factor for attracting and retaining talent in varying career stages in an organization.

Kate Terrell, Vice President, Human Resources Global Products Organization, Whirlpool Corporation

With the raging war for talent, organizations are looking for straightforward, easily accessible ways to develop their existing workforce. HR organizations will be pleased to find this workbook flexible enough to be used by aspiring leaders independently or as part of a comprehensive leader development program. If you're new to the challenges of leadership or have been figuring it out on your own, this workbook will guide you every step of the way!

Michelle Reese, Associate Vice President, HR Strategy, Communications, and Change Management, The Ohio State University

Great leaders acknowledge the need for constant growth and development. The concepts in this workbook provide a framework that supports this development while emphasizing the particular needs of an emerging leader. Through the use of this workbook, you will be able to define your own strengths as a leader and gain important insight into how to use those leadership capacities to influence others, create a vision, and to make a positive contribution to an organization.

Amy Barnes, Ph.D., Faculty, The Ohio State University

Strong technical skills are the foundation of a great engineer. Just as engineers, the most successful leaders best augment these skills with self-awareness, authenticity, an ability to manage multiple highly complex issues, and an ability to navigate organizational politics with finesse. This workbook helps strong performers build on those skills to become either stronger individual contributors or highly effective leaders.

Ahmet Selamet, Chair, Department of Mechanical and Aerospace Engineering, The Ohio State University

This workbook helps you ask key questions of yourself as you emerge into leadership roles. Be patient as you grow. Take notes and be grateful for both good and mediocre leaders. The good ones model the way. The bad ones remind us what not to do. This workbook will help shape you into an "excellent" leader.

Carla Paonessa, Chair, LeaderShape Board of Directors and Retired Managing Partner, Accenture

As a recent college graduate, I had been looking for opportunities to further my development as a leader. The Innovative Leadership Workbook for Emerging Leaders and Managers has helped me to build invaluable skills to support moving into a new entrepreneurial role. The exercises help me understand my strengths and determine my developmental goals. The workbook and exercises have shaped my approach to life, both personally and professionally.

Anna Klatt, Entrepreneur, Mindful Management, LLC., LeaderShape Institute Graduate

Maureen and her co-authors have put together a fantastic workbook for young leaders that provides ways to apply leadership theory in a structure that makes sense. The examples of the vision-based exercises will be useful for anyone looking for a foundation on which to begin.

Roger Chen, Google Analyst, LeaderShape Institute Graduate

In today's dynamic world, it is critical for organizations to create a leadership development pipeline that will enhance its ability to create distance and differentiation from the competition. Leaders need solid skills to be prepared to meet the growing complexity of problems they are facing on a daily basis. This workbook affords organizations the opportunity to develop leaders using a self-paced approach that can augment internal or external development programs.

Michael Linton, Retired CEO Adecco, CEO Staffing Leadership

A seasoned mentor will guide you through the early stages of your development as a leader. For those of you who don't have that mentor, there's Innovative Leadership for Emerging Leaders and Managers. Guided by this book, you'll develop your understanding, testing, and learning about your own leadership.

Jim Ritchie-Dunham, President of the Institute for Strategic Clarity and Adjunct Faculty, EGADE Business School, Harvard

