



Post-Graduate Certificate in Psychosynthesis Leadership Coaching

Unit Two Course Study Guide

Agendas in Leadership Coaching

Prepared by Aubyn Howard and Paul Elliott

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Psychosynthesis Coaching Limited

Course Directors:

Aubyn Howard: aubyn@psychosynthesiscoaching.co.uk

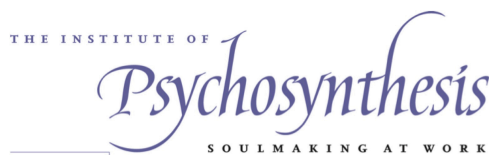
Paul Elliott: paul@psychosynthesiscoaching.co.uk

The Institute of Psychosynthesis

Institute Director: Roger Evans

The Institute of Psychosynthesis, 65A Watford Way, Hendon, London, NW4 3AQ

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Unit Two Course Study Guide: Agendas in Leadership Coaching

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Unit Two Study Guide: Agendas in Leadership Coaching

Context

The overarching context for this unit is **engagement**, with the client and the organisational world. Whilst continuing to hold the context of trifocal vision, this unit takes the you into the world of organisational leadership and provides a map of the types of client agenda you might come across and how to approach them. It introduces and applies our model of leadership agendas.

Building upon Unit 1, we start to explore the deeper level of agendas and issues within organisations; working with purpose, identity, meaning and values, and engaging with the change and crises that emerge in relationship to these, both at individual and organisational levels.

We show you how to understand better what is going on in organisations by holding multiple perspectives and taking a developmental approach to leadership and organisational cultures. We provide an overview of the leadership field and review several different approaches and thinkers within it. We focus on the human process of change and introduce models and tools that can be used in coaching to support leaders manage the change process.

Outcomes

1. Understanding of **organisational dynamics** and the leadership agendas that are brought to coaching
2. Enhanced ability to draw out, recognise and engage with different **leadership client agendas**
3. Knowledge and understanding of a **range coaching models, strategies and tools** that support being an effective leadership coach
4. Increased confidence in using **Trifocal Vision** as the core model of Psychosynthesis Leadership Coaching
5. Enhanced basic human skills of coaching, including **Building the coaching alliance**
6. Enhanced basic process skills of coaching, including **Creating awareness** and **Agenda forming and goal setting**

Weekend 2: Outline of Three Day Workshop

Session	Day One	Day Two	Day Three
Check-in/review 10:00 Day 1 09:00 Day 2/3	Check-in. Introduction to coaching within an organisational context.	Check-in and reflection.	Check-in and reflection.
Session 1	Exploring client agendas - practice	The Leadership Context - small group task	Change theories, models and tools (e.g. Kubler-Ross, Bridges, CLC, etc.)
Break			
Session 2	Exploring client agendas - plenary and model of leadership agendas.	The Leadership Context - plenary. Wilber's integral framework.	Engagement with change client agendas - triads practice
Lunch 13:30-14:30 Day 1 12:30-13:30 Day 2/3			
Session 3	Laloux's developmental perspective - small group exercise	Working with organisational systems - Oshry exercise	Engagement with change client agendas - group debrief on learning.
Break			
Session 4	Laloux's developmental perspective - seminar and role play	Working with organisational systems - fishbowl clinic	Psychosynthesis perspectives on change and crisis
Break			
Session 5	Introduction to Professional Bodies: ICF, EMCC, AC and APECS	Perspectives on leadership (including Bushe, Jaworski, Evans)	Homework
Check-out/ completion End 18:00 Day 1 and 2 End 16:00 Day 3	Check-out	Check-out	Check-out

Unit Two: Agendas in Leadership Coaching: Key Topics

Leadership and Organisational Context

Introduction to coaching within an organisational context
Wilber's integral framework
Laloux's developmental perspective
Leadership context and perspectives on leadership
Working with organisational systems (e.g. Oshry, Shaw)
Change theories, models and tools (e.g. Kubler-Ross, Bridges)

Working with agendas in leadership coaching

PCL model of leadership agendas
Psychosynthesis perspectives on change and crisis
Engagement with change client agendas

Coaching profession

Introduction to Professional Bodies: ICF, AC, EMCC and APECS

Coaching Competencies

Building the coaching alliance
Agenda forming and goal setting

Unit Two: Agendas in Leadership Coaching: Key Topics

Leadership and Organisational Context

Introduction to coaching within an organisational context

The perspectives on the organisational client landscape that we will take include:

- ❖ Wilber's integral framework
- ❖ Laloux's developmental perspective
- ❖ Organisations as complex adaptive systems

Wilber's integral framework

The Integral Model

By 'Integral', we mean that all the key perspectives or dimensions of human knowing are taken into account; that we acknowledge objective as well as subjective 'truth', that we include the exterior realm of measurable and observable behaviour as well as the interior world of values, meanings and motivations, at individual and collective levels.

subjective	objective
inter-subjective	inter-objective

Wilber's Integral Model can be applied to any human area of interest: to what is going on in the world; to a specific organisational situation or leadership challenge; to the fields of leadership and organisational change; to your own development as a leader or coach. An Integral perspective helps you to understand the dynamics behind change and transformation, diagnose complex organisational situations and decide what intervention strategy is needed.

The integral Model can be used as a tool to guide and support leaders in developing their capacity for systemic, integrative, holistic thinking. The Integral Model complements and integrates other approaches, models, tools and techniques for leaders; it provides a way of understanding how all the other approaches fit together and when each one might be useful to you. It also helps you see the partiality and limitations of specific leadership approaches so that you can avoid their pitfalls.

From Wilber's website:

The four quadrants – simply refer to four of the most important dimensions of the Kosmos, namely, the interior and the exterior of the individual and the collective.

Once we include both hierarchies and heterarchies - both ranking and linking - we can develop a more integral vision that is "all-level, all-quadrant", a vision that includes the I and the We and the It domains - or self, culture, and nature - as they all unfold in matter, body, mind, soul, and spirit, spanning the entire spectrum of consciousness in all its radiant dimensions. This includes multiple modalities, waves, streams, states, and realms, all woven together into a global holism or universal integralism.

This multidimensional Kosmos is therefore not just a final state, but a flow state. Not just holographic, but holodynamic. Not just given, but ceaselessly unfolding, in multiple waves and streams of existence, flowing and evolving in endless displays of Spirit's own self-blossoming. Therefore, let us honour and include these unfolding, developing, evolving currents as the Kosmos flowers in all its domains.

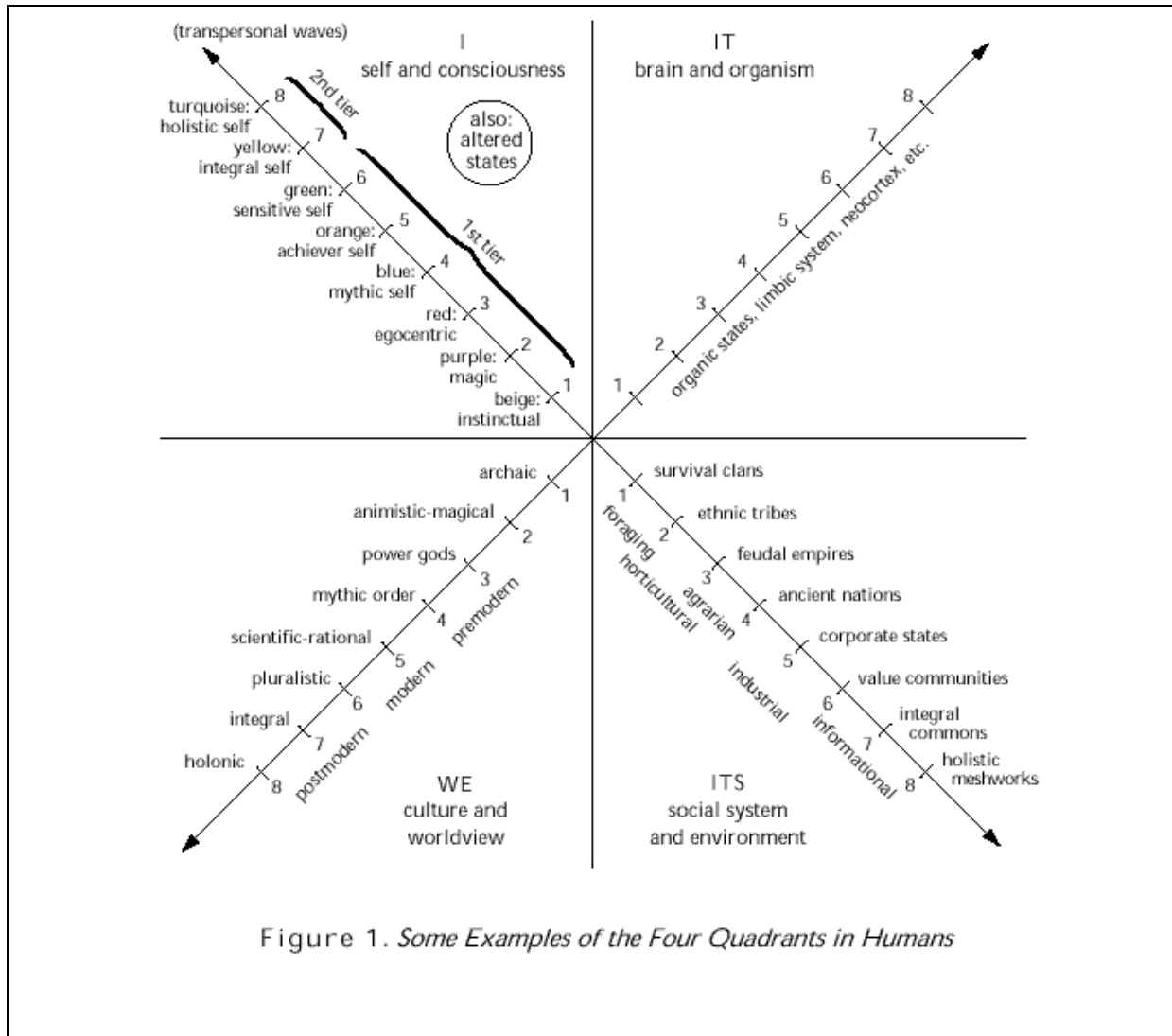


Figure 1. Some Examples of the Four Quadrants in Humans

Laloux's developmental perspective

Overview of the developmental model applied to leadership

I will outline the model of leadership paradigms described by Frederic Laloux in his recently published work 'Reinventing Organizations' (2014, see chapter 1.1 for a fuller treatment of this whole topic), which is based primarily upon Ken Wilber's (e.g. see Integral Psychology, 1999) and Jenny Wade's (e.g. see Changes of Mind, 1996) meta-analyses of the various models that focus on different aspects of human development (e.g. ego-identity, cognitive, moral, value systems, etc.) at individual and collective levels and are founded on validated scientific research. The research work by Clare Graves on the emergence of value systems (probing people's conception of adult full maturity) and that of Jane Loevinger on stages of development of ego-identity have provided the foundations for later adaptation to the organisational domain - Spiral Dynamics builds upon Graves' work to describe value systems in organisational terms and The Leadership Development Framework uses a language specific to the stages of leader development and associated crises of transition. Although their delineations of actual stages are slightly different, it is relatively easy to see how both these and other systems derived from unrelated original research, are all describing the same *essential unfolding pattern of human development* and evolution, but from slightly different perspectives.

Laloux describes seven organisational paradigms that broadly follow the emergence of human consciousness and societal worldviews over thousands of years of human history, but also mirror the developmental stages that individuals follow as they grow up and mature in adulthood (at least in potentiality). These are; **Reactive, Magic, Impulsive, Conformist, Achievement, Pluralistic and Evolutionary**. It may help to think of these as ways of thinking and operating in the world, which are more or less activated within an individual, group, organisational or society depending upon history, circumstance and situational factors.

Over the course of human history we can trace the initial emergence of each new manifestation of consciousness and how the prevailing paradigm has then shifted from one to the other, but even in today's global society, there are widely different mixes and expressions of these different paradigms in different societies, organisations and people. Although an individual (organisation or society) will generally have their *centre of gravity* within one or other value system, they are always expressing a unique mix of more than one, as influenced by their story and personality. In addition, everyone has the capacity for all the value systems to emerge, although the way in which this happens over time will always broadly follow the primary sequence (e.g. you can't fully activate at Pluralistic until you have in some way activated at Achievement, and so on). Graves made a particular point that the emergence of value systems are responses to situational challenges to which the previous way of thinking or operating are no longer providing valid or useful solutions (akin to Einstein's quote about problems not being solved by the same level of thinking that gave rise to them in the first place). The transition from one paradigm to the next is often characterised by an inner or outer crisis of some kind, for example a crisis of meaning for an individual for whom the Achievement paradigm no longer works, or the crisis of survival for an organisation which needs to outgrow a rigid hierarchical model if it is to compete successfully with new market entrants. Turbulence, upheaval or changing circumstances has driven human progress in the past (see the work of Jared Diamond, 2007) and in the same way it is the challenges facing today's organisations that will give rise to the new evolutionary paradigm emerging through new styles of leadership, cultural orientations and organisational models. At the same time, there is never a guarantee that this will happen, at least within today's organisations and often progress follows the birth of new organisations that are more agile or adapted to present day challenges, alongside the death of the old. Ken Wilber paraphrases Max Planck when he says "the knowledge quest proceeds funeral by funeral". The history of evolution in nature is littered with long forgotten extinct species and human evolution with disappeared civilisations (and organisations) that failed to adapt and evolve in response to a crisis.

Inner and outer leadership

Let us now explore the dynamic between inner and outer aspects of leadership. This approach holds that leaders inner orientation, which is made up of *constellations* of beliefs, assumptions, motivations, mindsets and ways of thinking which we refer to as *paradigms* or *worldviews*, will broadly determine or give rise to their outer expression of leadership style, although the way in which this happens on an individual basis will be influenced by the leaders unique personality, preferences, skills, experience and so on. If we were to ask a broad mix of people working in organisations what 'leadership style' means to them, they will probably refer to styles in terms that describe their outer impact and way of operating, for example; controlling, egotistic, top-down, consensual, democratic, charismatic, motivating, encouraging, empowering, paternalistic, hierarchical and so on.

The developmental system we will outline provides a way to see the pattern behind these different outer styles and realise that there is a progression from less sophisticated styles to more sophisticated, from styles suited to simple organisational systems and challenges to those needed to deal with the

complexities of today. According to the Gravesian model, alongside this progression to greater complexity, there is also a cycling between individualistic value systems and collectivistic value systems, in other words, from those that emphasise individual values to those that place greater value on teams, the whole organisation and even the wider knowledge community. At each turn of the cycle, the collective orientation is always enlarging, i.e. from tribe or group, to organisation or nation, to society or human kind.

The table below provides a quick summary of the characteristics of each paradigm and how they translate into corresponding leadership styles. Again, we are skimming the surface here and for a fuller treatment I recommend reading the first part of Frederic Laloux's book or dipping into Ken Wilber's comparative analysis (e.g. A Theory of Everything, 2000).

Leadership styles, Leadership paradigms (Laloux) and value systems (Graves/Spiral Dynamics) aligned

Leadership style (outer impact) and other expressions	Leadership paradigm (inner orientation) + Graves thinking mode	Cultural orientation + Organisational model + Primary motivations	Individual or collective orientation and locus of attention
Benevolent + <i>Paternalistic/Maternalistic</i>	Magic + <i>Animistic (BO)</i>	Family + <i>Circle</i> + <i>Belonging/Continuity</i>	Collective – tribe, family or group safety
Autocratic + <i>Egotistic/Dominating</i>	Impulsive + <i>Egocentric (CP)</i>	Power + <i>Autocracy</i> + <i>Rewards/Respect</i>	Individual – own needs and wants
Hierarchical + <i>Controlling/Processing</i>	Conformist + <i>Absolutist (DQ)</i>	Role + <i>Hierarchy</i> + <i>Responsibility/Duty</i>	Collective – roles and rules within structures
Enterprising + <i>Rational/Driving</i>	Achievement + <i>Multiplistic (ER)</i>	Achievement + <i>Adapted hierarchy</i> + <i>Success/Winning</i>	Individual – individual and team performance
Social + <i>Democratic/Relational</i>	Pluralistic + <i>Relativistic (FS)</i>	Relationship + <i>Flatter hierarchy</i> + <i>Participation/Self-expression</i>	Collective – team and organisational culture
Integrative + <i>Systemic/Evolutionary</i>	Evolutionary + <i>Systemic (GT)</i>	Evolutionary + <i>Self-management</i> + <i>Learning/Freedom</i>	Individual – professional networks
Holistic + <i>Transformational/Evolutionary</i>	Evolutionary + <i>Holistic (HU)</i>	Evolutionary + <i>Self-management</i> + <i>Transformation/Purpose</i>	Collective – global communities

Within each stage, there can be healthy and less than healthy expressions of leadership style, both depending upon the individual's level of psychological health and personal development, as well as the suitability of the leadership style to the organisational situation and challenges. It has been successfully argued (e.g. Manfred Kets de Vries, *The Leader on the Couch*, p24, (2006)) that in today's modern organisational environments (centred in the Achievement paradigm but with elements of Impulsive, Conformist and Pluralistic, according to historical, market and situational influences), that the people who rise to the top of hierarchical and competitive organisations are more likely to have some kind of personality pathology, certainly to be more self-oriented, egotistic or narcissistic, than the average person. Business folklore is littered with stories of charismatic, powerful business people who, at least on the surface have been highly successful, but around whom there has been much collateral damage in human terms. Only as the Pluralistic paradigm starts to become stronger is it more likely that genuinely empathetic, other-oriented, well-balanced, personality types are likely to become successful managers and leaders.

Full descriptions of leadership styles:

Benevolent – they lead as the guardian of a community. They tell stories, maintain traditions, and seek to preserve the wisdom of the past.
Autocratic – they lead decisively and from the front, they are in charge. They control power and reward loyalty. Their way is the right way.
Hierarchical – they lead by passing judgement according to a system of well defined roles and responsibilities. They follow the established right way to do things.
Enterprising – they lead by example and by creating opportunities for the team to succeed. They are driven to achieve goals. They constantly look for better ways to do things.
Social – They lead by building consensus and providing opportunities for people to grow and develop. They know there is no universally right ways to do things.
Evolutionary-Integrative – They lead by responding to situations in whatever style is needed, seeking to create synergy within the wider system. The right way is the way that works.
Evolutionary-Holistic – They lead by guiding others to be leaders and by creating the context for growth within a healthy system. They are constantly evolving a new way or path.

Dynamics of how leadership paradigms evolve

In our description above, we have left out the first worldview or paradigm, which Laloux labels Reactive, because it is rarely found overtly in today's organisations, although echoes of humankind's evolution as small bands surviving as foragers or hunter-gatherers between 100,000 years and 20,000 years ago are still present in our deeper psyche and collective unconscious – for example within our instincts for fight or flight in response to perceived danger. In the same way all human beings are deeply impacted and imprinted by the corresponding early experiences of dependent infancy, even though these first few months of life are beyond our conscious memory.

Magic-Animistic

The Magic-Animistic leadership paradigm which is expressed through a Benevolent leadership style is more obviously present in some form within organisations. The paradigm emerged in human history as part of the move towards tribal society some 20,000 years ago, and is often expressed and embedded through tribal or family like metaphors or rituals within organisations or teams, and may become reactivated at times of threat to survival of the group. The organisational model and culture associated with this paradigm does not provide fertile ground for innovation or in fact progress of any kind at all, as the underlying though form is one of the maintaining cycle, as in the cycle of the seasons and the performing of traditions passed on from generation to generation. The Magic-Animistic paradigm is most usefully found today in traditional family businesses which have remained untouched by the influence of technological progress. However, this doesn't mean that distorted expressions of associated leadership styles (e.g. patriarchal, paternalistic, materialistic) are not present in all types of organisation, usually as a consequence of psychological dysfunction of individuals who unconsciously meet unresolved psychological needs by taking up permanent parental roles beyond what is healthy in nurturing, mentoring or protecting those in their charge.

Impulsive-Egocentric

In historical terms the Impulsive-Egocentric paradigm started to emerge with chiefdoms and eventually empires between 10,000 and 5,000 years ago, and in psychological terms it represents the fully formed ego differentiating itself from parental symbiosis, and in this sense is the first truly individualistic (although very egocentric) worldview. The first Impulsive organisations appeared as small conquering armies and this still represents a powerful organisational archetype today. Although

street gangs and criminal organisations today can still be quite close to this model, variations can also be found in small businesses and start ups that are driven by the energy and ego of the founder and where 'their glue is continuous exercising of power in interpersonal relationship' (Laloux, p18). More commonly we find both healthy and dysfunctional expressions of power-oriented autocratic styles of leadership present in all types of relationship, often masquerading as more sophisticated styles (e.g. Achievement orientation – for good examples watch the Apprentice reality TV programme in the UK). From professional observation, a generous dose of autocratic leadership style, (founded on a degree of ego-narcissism or at least an inflated sense of self-worth) is very common in a typical start-up organisation and can be seen to be part of the mix in many successful small organisations. The reason might partly be that entrepreneurs need a degree of inflated self-belief to break through initial barriers and keep their business or project going against the odds. This can also be associated with very creative times for a business, but usually in support of the original business idea, innovation or purpose. Typically, such organisations arrive at a creative or innovative impasse at some point in their growth, unless the power-oriented leader is able to adapt his or her style, or has the wisdom to allow a succession of leadership to take place. This is the first crisis of organisational growth (see The Five Phases of Growth, Larry Greiner, HBR May-Jun 1998 for a different perspective on this). Often this takes place by default at the point when business founders sell to a larger company or seek some kind of institutional investment, and whether willingly or not, the style of leadership changes and the organisational structure formalises and develops to distribute responsibility away from the power leaders and towards smaller units. Sometimes this transition process to a more formal organisational model either inadvertently kills off the original creative culture (with people leaving) or leads to conflict between the start-up founders and the new parent leadership.

Conformist-Absolutist

Here we are describing the organisational transition from Impulsive-Egocentric to Conformist-Absolutist. The historical emergence of Conformist started about 4,000 years ago, with the transition from chiefdoms to nation states and stable civilisations, and subsequent founding of the worlds great religious traditions. This has been the prevailing organisational model ever since until the last century or two, and is still the backbone for much of what we would consider to be the establishment today – church, armed forces, government and universities for example. The Conformist-Absolutist organisational model is a significant progression from what comes before in that 'organisations can now plan for the medium and long term and they can create structures that are stable and can scale' (Laloux, p20). In order to grow, many organisations draw upon the Conformist-Absolutist paradigm by establishing clear roles, responsibilities and processes that enable this scaling. The build up of bureaucracy, inertia and conformity that characterises this model as organisations become larger and larger (sometimes not through organic growth but by acquisition) can then become the problem. Again, this paradigm contains within it the seeds of its own destruction, or at least the death of organisations that fail to evolve beyond it in response to environmental change.

The accompanying change in leadership style is startling in its reversals away from autocratic self-orientation and opportunism – towards duty, responsibility and professional dedication. The Leadership Development Framework developed by Fisher, Rooke and Torbert (see Personal and Organisational Transformations, 2000 and Seven Transformations of Leadership, HBR April 2005) delineates two distinct leadership styles associated with this paradigm – the dutiful Diplomat, who conforms to and enforces the expected norm and the professional Expert, who is dedicated to excellence within their discipline and leads as a role model for those starting out in their profession.

Achievement-Multiplistic

The prevailing organisational and leadership paradigm in western society and certainly in business organisations, is Achievement-Multiplistic. In historical terms, this emerged in the shape of the western enlightenment something over three hundred years ago and has driven not just the explosion of scientific and technological discovery, the industrial revolution and economic growth, but also the growth and dominance of prosperous modern democratic societies. Three big breakthroughs accompany the emergence of this paradigm which inform the Enterprising style of leadership – innovation, accountability and meritocracy (Laloux, p26). In terms that we understand today, innovation really gets going with this paradigm and leadership style. Leaders operating from this paradigm can 'live in the world of possibilities, of what is not yet but could be one day'. There is no longer just one right way to do things but a multiplicity of possibilities. They challenge the status quo, always looking for better ways to do something and they are open to change, uncertainty and opportunity. Thus they challenged the morbidity and hierarchical inflexibility of Conformist-Absolutist organisations and invented departments that did not previously exist, including R&D, marketing and product development, as well as the project driven way of working that has superseded the purely process driven operating model of Conformist organisations. Most of what is considered to be good leadership today is an expression of this paradigm and way of thinking – the Achiever leader encourages and enables teamwork, rewards and recognises performance and leads by example.

The Achievement paradigm contains within itself the seeds of new problems, and is itself now the barrier to the emergence of the next leadership paradigm. This is because it mitigates against a more multi-dimensional perspective of leadership becoming widespread (it doesn't see the point, because it is confident in its own superiority as a way of looking at the world). So the Achievement worldview and style of leadership has become part of the problem; by over-obsessing on the need for success in the short term (which feeds and is driven by the investment world); by focusing on success and winning rather than purpose; by over-emphasising the rational or cognitive in relationship to the emotional, social, spiritual and ethical dimensions of human beings; by maintaining the underlying limitations of the hierarchical system (as the hangover from the previous Conformist paradigm) and over-focusing on management – adding more and more layers of management as the answer to most problems, rather than stripping them away to release the creativity of those who are managed. There are interesting echoes here of the fault lines in our wider modern market-capitalist society, which have become increasingly apparent since the start of the global economic crisis in 2008. We are facing crises throughout business and society, from how to deliver better health services to how to respond to climate change, and increasingly people are beginning to realise that the answers to these crises may not come from the Achievement paradigm type of thinking.

If you are following this narrative, you might now be asking if there is a leadership paradigm representing a new shift in societal consciousness that addresses these issues of the prevailing Achievement paradigm. Yes there is, but before this arrives, there has been something of a diversion (albeit an essential and valuable one) – with the rapid emergence of the Pluralistic paradigm.

Pluralistic-Relativistic

The emergence of new paradigms is seemingly speeding up as part of the evolution of human consciousness, society and culture. In the last 50 years or so, the Pluralistic worldview has developed at an astonishing pace and now pervades many spheres of society (e.g. the arts, academia, not-for-profit organisations, left-wing politics, etc). This is the emergence of post-modernism, partly in reaction to materialistic modernism, of championing the people principle as a counter-balance to the profit principle, of the human perspective as antidote to the mechanistic clunk-and-grind economic

progress of the Achievement paradigm. The Pluralistic-Relativistic paradigm brought three significant breakthroughs within organisations (Laloux page 32): empowerment; values driven culture; and the stakeholder perspective. These developments are now embedded in most modern large organisations, alongside (but not instead of) Achievement-Multiplistic's principles of innovation, accountability and meritocracy. The paradigm is expressed through a more democratic, social, relational and humanistic style of leadership. People are increasingly nurtured, developed and consulted by leaders. This has certainly made organisations more human places to work, and improved the experience of work for many people. There is one problem – although there are examples of value driven businesses delivering improved shareholder value, there are also examples where it hasn't and even some cases where the Pluralistic paradigm and associated leadership style has become too dominant and performance has got worse, threatening the survival of the organisation (e.g. Prudential in the early 2000's). This has contributed to distrust between Achievement-Multiplistic and Pluralistic-Relativistic leaders, to a clash of value systems between Profit and People orientations, waging away beneath the surface. The deeper problem is that despite the human tone that Pluralistic leadership style brings (listening, empowerment, engagement, 360 feedback, etc.), people still do not trust their organisations and will not bring their whole selves to their work (and therefore their full creativity and innovative edge). The fact that they need to be empowered by leaders, engaged by the organisation and enrolled in it's purpose, means by definition that at some point they have become disempowered (through the concentration of power at the top of organisations), disengaged and alienated from a purpose that they were not involved in coming up with it in the first place.

Part of the problem is yet again, that the adherents of the Pluralistic paradigm and style of leadership do not see the whole picture, and set themselves against the excesses of the previous materialistic worldview. On one level they maintain that no ones viewpoint is more valid than anyone else's, and on another they also secretly believe that theirs is the right one. Importantly, however, despite it's inherent contradictions, by bringing the human being and our emotions back into the picture, the relativistic perspective lays the ground for the emergence a truly transformative worldview, and evidence that this is finding its way into organisational and leadership expression has started to appear.

Evolutionary-Systemic

Management writers, gurus and consultants have been proclaiming the next great leadership paradigm for some time and largely been missing the target (typically by oversimplifying and conflating the old paradigms and by over-idealising or over-identifying with the new one). What makes Laloux's work (2014) ground breaking is that he has carried out detailed research of a dozen large organisations where the new worldview has taken shape and describes the Evolutionary paradigm and associated leadership styles based upon evidence of what he found in common. Importantly, he properly draws out the sequence of previous paradigms, and shows how each new way of thinking and operating is both built on the gains of the previous one and is also an emergent response to it's inherent limitations. He shows how evolutionary organisations can work radically differently (at once they are more effective, innovative, ecological and human to work in) to the great majority that we know and experience today. Drawing from evidence, he identities three common characteristics or principles of evolutionary organisations – self-management, wholeness and evolutionary purpose. He plays with the metaphor of organizations as living systems or organisms with a purpose of their own, in contrast to the clunky and alienating machine metaphor's that identify the Achievement paradigm or the social and family metaphors that signal Pluralistic.

Laloux explores how the structures, practices, leadership styles and cultures within evolutionary organisations reflect the principles of self-management, wholeness and evolutionary purpose. He

identifies the two necessary conditions for the emergence of Evolutionary organisations – a sufficient level of psychological development of the top leadership (e.g. CEO or founders), and ‘enlightened’ owners who are willing to embrace and trust the Evolutionary worldview of these leaders.

The shift to an Evolutionary worldview is of a magnitude greater than any of the previous paradigm shifts we have described. It is variously called second-tier, higher-order or meta-something for this reason. From this perspective, the leader can work with the whole system of all the previous paradigms or worldviews and see the part they play in the evolutionary process. It is not just another worldview or paradigm, but one that can work with the health of the whole system of paradigms. More importantly for this topic, research has shown (e.g. by Bill Torbert, 2005) that Evolutionary leaders are by far the most successful at implementing large scale corporate transformation programmes. Clare Graves describes similar findings concerning creativity in finding creative solutions, when comparing groups of people operating from different paradigms and given complex tasks to perform, he found the Evolutionary group would find ‘unbelievably more solutions than all the other groups put together’, and of ‘an amazingly better quality’. Laloux’s research comes to very similar conclusions – organisations with Evolutionary leaders are far more effective and innovative than similar organisations working under Achievement or Pluralistic leaders.

Shades of the evolutionary paradigm

The system we have described culminates with the Evolutionary paradigm. To some extent this conflates two distinct stages within Clare Graves’ schema (GT/Systemic and HU/Holistic) and possibly three stages within the LDF (Strategist, Alchemist, Ironist). This is not a great problem when talking about organisational paradigms as transformational and radically different ways to look at organisation. However, when applied to leadership styles, I will maintain that it’s important to make the distinction between GT/Systemic and HU/Holistic, using the Graves model. For example, the Systemic stage is more individualistic and the Holistic stage is more collectivist. I strongly recommend not losing sight of Graves’ cycling between individual and collective orientations in the developmental spiral, as it helps create awareness of this dimensionality. In my practice of profiling leaders I have noticed quite distinct differences between these perspectives and expressions, that the Systemic paradigm invariably comes first, and that little of the Holistic paradigm is found in large modern organisations (so much so that for some years I took it out of my diagnostic tools, but with Laloux’s work I am encouraged to bring it back). Therefore in the profiling tool that we have developed we will make this sub-distinction within the evolutionary paradigm. So we will sometimes describe the later paradigms or styles together as ‘Evolutionary’ and sometimes as two distinct phases, Evolutionary-Systemic and Evolutionary-Holistic. This may be a little messy both in theory and practice, but I think it is also important that we follow Laloux’s model as closely as we can as this is the one that I expect to take hold in mainstream discourse.

Leadership context and perspectives on leadership

- ❖ The leadership context
 - What do we mean by leadership?
 - Why is it important now?
 - Why leadership coaching?
 - What do we mean by our 'calling'?

- ❖ Perspectives on leadership
 - Concepts of good leadership
 - Being versus doing of leadership
 - Leadership modelling and profiling approaches
 - Leadership paradigms and styles

- ❖ Leadership approaches
 - Clear Leadership – Gervase Bushe
 - Inner path of Leadership – Joe Jaworski
 - Five Dimensions of Leadership – Roger Evans
 - Self-actualisation – Abraham Maslow
 - Etc.

Jaworski	Maslow	Collins	Kotter
Evans	Bushe	Blanchard and Hersey	Kouzes and Posner
Schein	Greenleaf	Shaw and Stacey	Oshry
Handy	Laloux	Senge	Wheatley

- Which are you familiar with?
- Others you would add?
- Which do you want to find out about?
- What are the essential differences?
- How might we synthesise these?

Working with organisational systems (Oshry)

Barry Oshry and Seeing Systems

Seeing Systems: Unlocking the Mysteries of Organizational Life (2007) by Barry Oshry (Author)

Extract from: The Organisational Workshop by Barry Oshry and Tom Devane at:

www.powerandsystems.com

Theoretical bias

Barry Oshry, creator of the Organisational Workshop, describes its theoretical roots:

In 1960, while at NTL Institute, I discovered the power of experiential learning: if you want to learn about groups, create a group and study its processes. Phase I began as I extended this concept to the study of organizations. At Boston University's School of Management, where I was teaching, my graduate assistants and I created organization exercises for 240 undergraduates in a Human Relations and Organizational Behavior course. In parallel, several colleagues and I began experimenting with organization exercises as part of NTL's Management Work Conference.

I entered Phase II as I noticed regularities in the ways Tops, Middles, and Bottoms experienced themselves and one another, even though people were randomly assigned to positions during the exercises. My early writing was descriptive--pictures of the unique stresses and predictable interaction difficulties of Tops, Middles, Bottoms, and Customers. This still left the questions, So what? What are the action implications of this?

Phase III came with the discovery of mutants, rare yet highly effective actions taken by Tops, Middles, Bottoms, and Customers. These mutants helped clarify what else is possible. Evolving over 30 years, these three elements have formed the essence of my work: experiential designs that make learning visceral; descriptive clarity, an awareness of how organizations usually function; and the alternative choices we have for creating more powerful human systems.

Table showing what the participants experienced in the OW exercise that matched what they were experiencing in organizational life.

Position	Condition	Description
Tops	Overload	Complexity and responsibility; lots of issues, unpredictable issues, issues that aren't dealt with elsewhere; responsibility for the whole system
Middles	Crunch	Feeling of being pulled between differing and often conflicting demands and priorities of Tops and Bottoms; being pulled apart from each other
Bottoms	Disregard	Problems with their condition and with the system; the sense that Tops or Middles ought to fix problems but do not
Customers	Neglect	Products and services not coming fast enough or with acceptable quality or price; inadequate organizational responsiveness

Table 1. Comparison of Participants' Experience with Exercise and with Organizational Life

The Basics

The Organization Workshop (OW) is a group learning session in which participants experience universal conditions, traps, and dilemmas of organizational life. By learning firsthand about these traps, along with solid theory on avoiding them, participants emerge with concepts, methods, and a common language to improve their interaction in any organization.

What exactly do we mean by "improving interaction"? We mean that participants learn to form partnerships for higher performance. The partnership-enhancing experiences and learning make it possible for individuals, groups, and entire organizations to operate more effectively and efficiently toward their goals. The workshop focuses on *all* forms of partnerships: higher-level to lower-level partnerships, lateral partnerships spanning organizational unites, and supplier-to-customer partnerships.

So how does the Organization Workshop help create conditions for organizations to achieve their goals by improving the way people interact? This is accomplished by helping people open their eyes to organizational processes and interactions about which they were previously unaware. But opening people's eyes is not enough--the Organizational Workshop provides people with new choices about how to act with their newfound system sight.

One could say that the purpose of the OW is to demonstrate why - despite our good intentions, well-trained people, and quality processes - our organization initiatives regularly fall short of our expectations. The reason for this depressing phenomenon is that, although we spend much of our lives in organizations and other social systems, we tend not to understand the system processes of which we are a part. The costs of this systems blindness are misunderstanding and conflict within and across organizational lines, decreased motivation and initiative, the breakdown of promising partnerships, misplaced energy, poor customer service, and more.

In the Organization Workshop, participants directly experience the costs of system blindness - the costs to them personally and to the organization - and they experience the organizational power as well as the personal liberation, creativity, and empowerment that come from moving from system blindness to system sight.

System Blindness	System sight
<ul style="list-style-type: none"> • We lose focus on the organization's overall objectives and engage in energy-draining peripheral activities that do not directly meet strategic objectives • We make up stories about other people's actions (in our stories we are the hero or the victim, never the villain) • We evaluate others as malicious, insensitive, incompetent • We take others' actions personally, as if they are acts against us • We react--get mad, get even, withdraw • That is the end of partnership 	<ul style="list-style-type: none"> • We stay focused on activities that directly support the organization's objectives and strategies • We have some empathy and understanding for others • We don't take their actions personally We don't get "hooked" by their actions • We stay focused on what it is we are trying to make happen • We are strategic • We take others' worlds and pressures into account • We stay in partnership

Table 2. Comparison of System Blindness and System Sight

Rolling out new principles to an entire organization is a challenge with any organizational-transformation effort. If an organization uses OWs as a change platform, the most effective transformations occur when everyone experiences an OW. One strategy has been to develop a cadre of skilled in-house facilitators who can then roll out the workshop through the organization. Another approach is to have a core group--preferably the most influential formal and informal leaders--experience the workshop first. These people can disseminate the principles by conducting discussions with other organization members. Another strategy companies have used is to conduct book discussions on this topic.

Organizations have reported a variety of outcomes, including reduced cycle times, improved quality, lower costs, and higher customer service levels. While the Organization Workshop does not specifically address any of these improvement areas, it *creates conditions* for realizing improvements by improving system sight.

The Organization Workshop helps organizations move from weak to powerful organizational systems--ones in which the organizational systems gets what it needs, and individuals get what *they* need.

The Complexity perspective: organisations as complex adaptive systems (Shaw)

Extract from: Patricia Shaw; Intervening in the shadow systems of organizations, Consulting from a complexity perspective. Journal of Organizational Change Management, Vol. 10 No. 3, 1997, pp. 235-250.

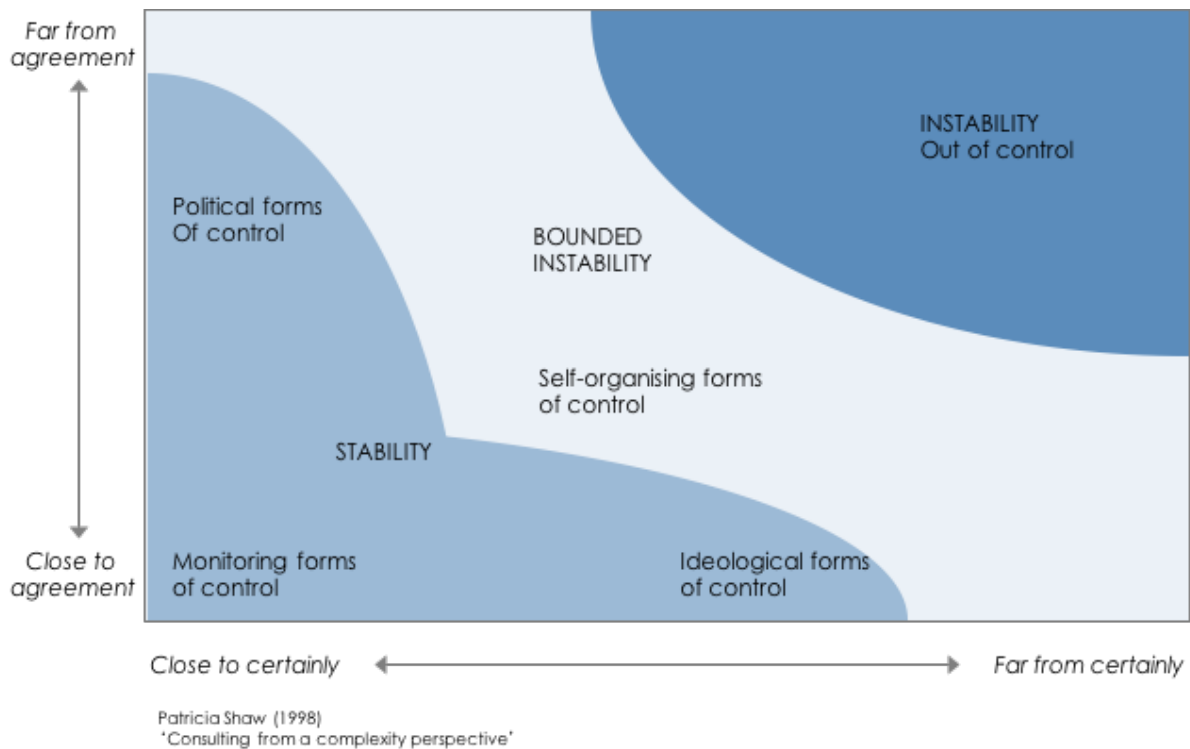
Introduction

This paper explores some implications of the theory of complex adaptive systems (Gell-Mann, 1994; Goodwin, 1994; Holland, 1975; Kauffmann, 1991, 1995) for the practice of organizational consulting, particularly that of organization development (OD). OD praxis is steeped in ways of conceptualizing organizations as open systems in dynamic equilibrium with their environments. This informs the goals and methodologies of OD consultants and focuses them on a design perspective to do with realizing the prior intentions of an organization's legitimate system, its prescribed network of relations or hierarchy, its bureaucracy and its approved ideology or explicitly shared culture. Although the existence of an "informal" organization has long been appreciated (see e.g. Schein, 1965, 1985; Trist and Branforth, 1951), this has been perceived largely as a source of inertia or "resistance" to the legitimate change effort, and much has been written on strategies for understanding and dealing with this (Coch and French, 1948; Klein, 1976; Kotter and Schlesinger, 1979; Kanter, 1985).

I will argue that taking a complex adaptive systems perspective provides a radically different way of conceptualizing how organizations change. This shifts consultants' attention away from planned change to the "messy" processes of self-organization that produce unpredictable emergent change. Complexity science is studying the nature of such dynamics in complex networks of adaptive agents, and suggests that "order emerges for free" without any central or governing control or intention when the network is operating in "edge of chaos" conditions (Kauffmann, 1995). Stacey (1996) has argued that self-organizing processes are to

be found primarily in an organization’s shadow system – that is, the complex web of interactions in which social, covert political and psycho-dynamic systems coexist in tension with the legitimate system. In the paradoxical conditions of “bounded instability”, such systems are capable of spontaneous novelty and emergent strategy.

From this perspective an OD consultant, like every member of an organization, is actively working with a paradox – an official role in a legitimate control system, facilitating an intended change effort, while simultaneously participating in a shadow system in which no one is “in control” but in which patterns of controlled behaviour emerge that profoundly influence the actual evolution of the organization.

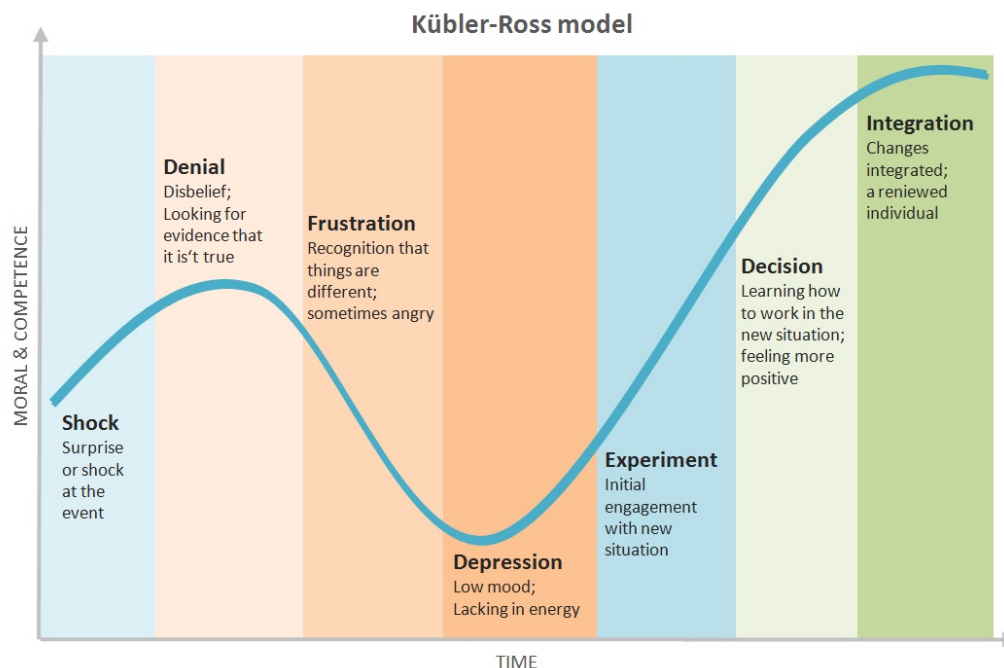


Change theories, models and tools

Kubler-Ross

Extract From: <http://www.entrepreneurial-insights.com/understanding-kubler-ross-change-curve/>
June 24, 2015

Change is an inevitable part and truth of life, and there is no running away from it. If change is well planned and formulated, it can produce positive results but even in spite of planning, change is hard to incorporate, accept and appreciate. This article shall throw light on the Kubler-Ross Change Curve (or also Kubler-Ross Model) that is the most reliable tool to understand change and the stages associated with it. The Kubler-Ross Change Curve can be effectively used by business leaders across the world to help their workforce adapt to change and move towards success.



WHAT IS KUBLER-ROSS MODEL?

The Kubler-Ross Change Curve which is also known as the 5 stages of grief is a model consisting of the various levels or stages of emotions which are experienced by a person who is soon going to approach death or is a survivor of an intimate death. The 5 stages included in this model are denial, anger, bargaining, depression and acceptance. This model was introduced by and is named after Elisabeth Kubler-Ross in a book called 'Death and Dying' which came out in the year 1969. This book, as well as the model, was inspired by her association and work with patients who were terminally ill. The psychiatrist Kubler-Ross got inclined towards this subject because of lack of research and information on the subject of death and experience of dying. She began her research by analyzing and evaluating those who were faced with death, but the examination took the form of a series of seminars and then patient interviews, etc. later on.

After the book 'Death and Dying', was published, the concept or the model was widely accepted, and it was found that it was valid in a majority of cases and situations relating to change. This model and her research also improved the overall understanding as well as the procedures followed in medical care. The 5 stages, according to her are transferable to different ways and degrees and may vary from person to person. Besides those who are faced by intimate death, this model also holds true in the case of others who may be faced by less serious physical conditions or trauma. Some of these situations or cases include injury, disability, work issues, relationship problems and financial problems, etc.

Relevance of Kubler-Ross Change Curve in Business

The Kubler-Ross Model also holds true when it comes to business, work or employment. Every organization needs to bring about changes in its management and policies. But besides the improvement of systems, there must be a change in the people or employees as well. If even in bringing about several changes in the systems and processes, the employees of your company persist in their old ways, and then the thousands of dollars invested will go to waste. This is why it is important for the employees too to adapt and change accordingly. Only when the workforce of an organization makes personal changes, or transitions can the company move ahead and reap the benefits.

Every organization needs to support the employees in the process of making transitions or changes. These individual transformations can be traumatic and may involve a lot of power loss and prestige issues. The easier it is for the employees to move along on their journey, the easier will it be for the organization to move towards success. Thus, this impacts the success rate and overall profits experienced by the company. The Change Curve in business is thus a powerful model that can help one understand and deal with changes and personal transitions. It helps to fathom how one will react to change and how to provide support during the process of change.

The 5 stages of grief

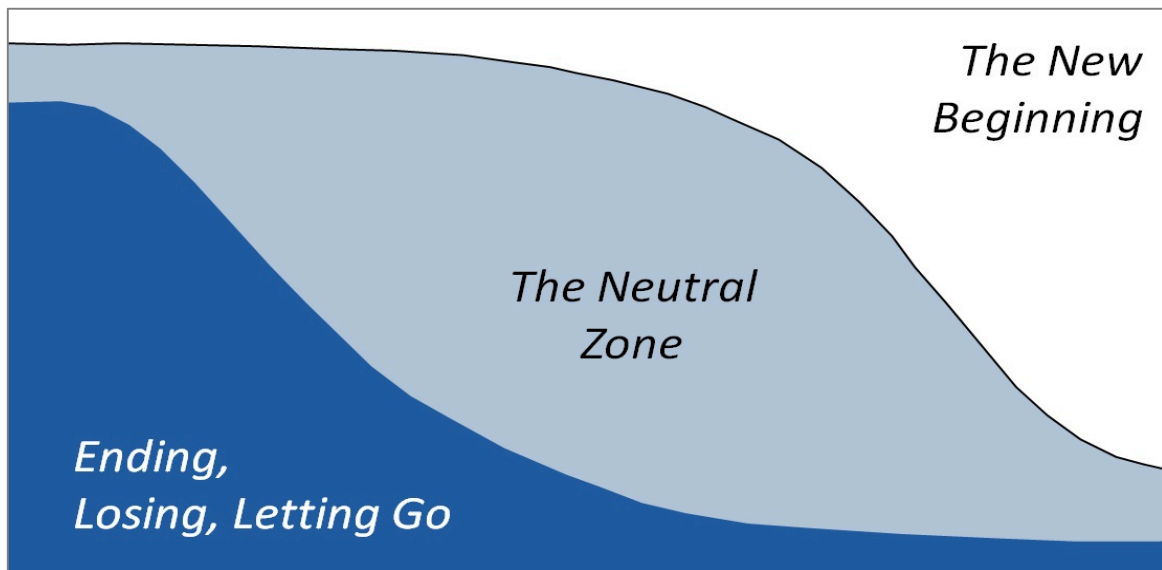
It is essential to understand that we do not move along the stages in a linear direction or step by step. A person tends to move into stages in a random order and may sometimes even return back to a previous stage after a certain point in time. Each stage can last for a different time period, and it is possible for a person to get stuck in a particular stage and not move on from there. The following are brief descriptions of each of the 5 stages of grief:

- 1 Denial: The Stage of shock or denial is usually the first stage in the Kubler-Ross Model and is mostly short-lived. This is a phase during which one puts on a temporary defense mechanism and takes time to process certain disturbing news or reality. One may not want to believe what is happening and that it is happening to him/her. It can bring about a dip in productivity and the ability to think and act. After the initial shock subsides, one may experience denial and may remain focused on the past. Some people tend to remain in the state of denial for a long time and may lose touch with reality.
- 2 Anger: When the realization finally hits, and one understands the gravity of the situation, he/she may become angry and may look for someone to blame. Anger can be manifested or expressed in many ways. While some take out the anger on themselves, others may direct it towards others around them. While some may be angry at life in general, others may blame the economy. One always tends to remain irritable, frustrated and short tempered during this stage.
- 3 Bargaining: When the stage of anger passes away, one may start thinking about ways to postpone the inevitable and try to find out the best thing left in the situation. Those who are not faced by death but by another trauma may try to negotiate in the situation and come to a point of compromise. Bargaining may help to come to a sustainable solution and might bring some relief to those who are moving close to what they wish to avoid altogether. The search for a different outcome or a less traumatic one may remain on during this stage.
- 4 Depression: Depression is a stage in which the person tends to feel sadness, fear, regret, guilt and other negative emotions. He/she may have completely given up by now and may now reach a dead end from where the road only seems dark. One may display signs or indifference, reclusiveness, pushing others away and zero excitement towards anything in life. This may seem like a lowest point in life with no way ahead. Some common signs of depression include sadness, low energy, feeling demotivated, losing trust in god, etc.
- 5 Acceptance: When people realize that fighting the change that is coming into their life is not going to make the grief go away, they resign to the situation and accept it completely. The resigned attitude may not be a happy space but is one in which the person may stop resisting change and move ahead with it.

While some people totally resign and go into a deep state of low energy, others may try to make the most of the time left on their hand and explore new opportunities. One has come to a point of peace and is prepared to take one whatever has to follow next.

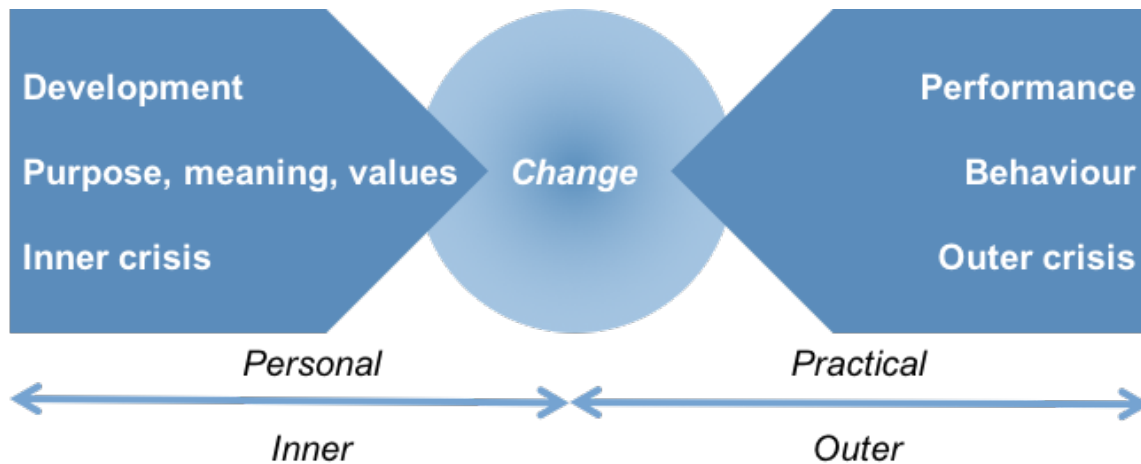
Stages of Transitions (William Bridges)

1. **Ending, Losing, Letting Go** - Letting go of the old ways and the old identity people had. This first phase of transition is an ending, and the time when you need to help people to deal with their losses.
2. **The Neutral Zone** - Going through an in-between time when the old is gone but the new isn't fully operational. We call this time the 'neutral zone': it's when the critical psychological realignments take place.
3. **The New Beginning** - Coming out of the transition and making a new beginning. This is when people develop the new identity, experience the new energy and discover the new sense of purpose that make the change begin to work.



Working with agendas in leadership coaching

PCL model of leadership agendas



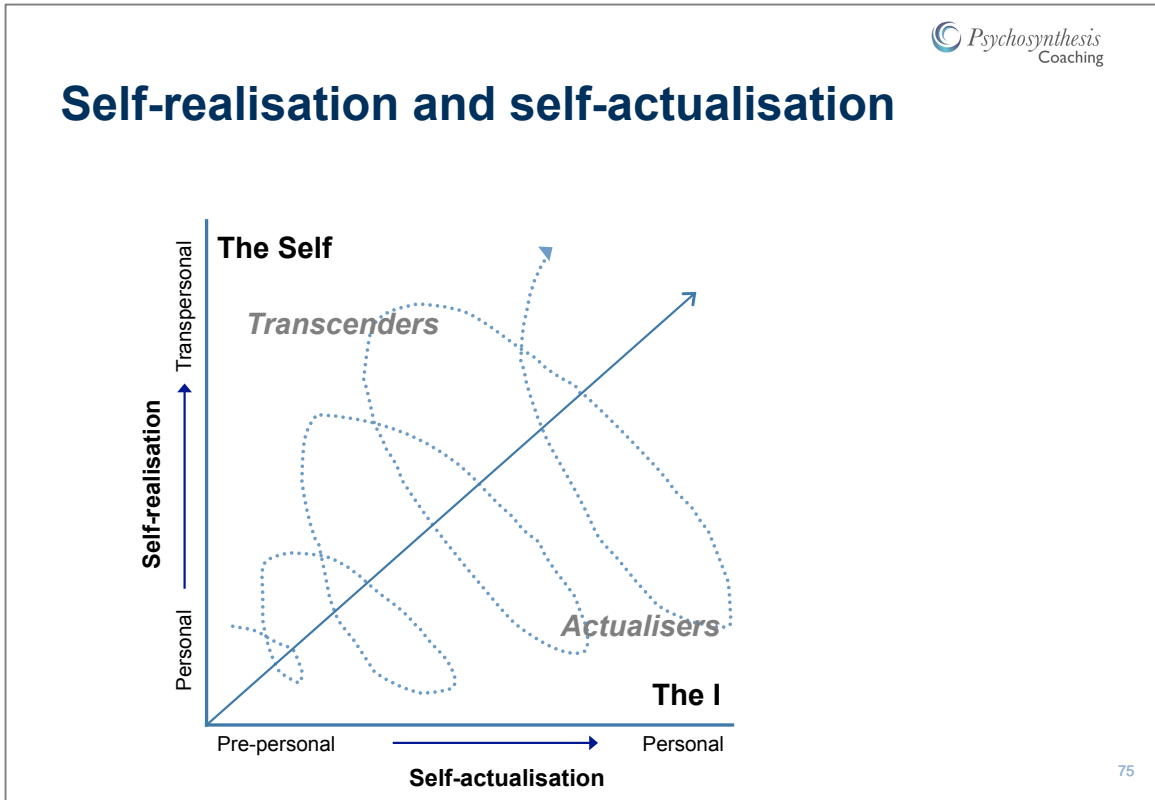
The **agendas and issues** that leaders bring to coaching have both an outer and an inner dimension. Working with your clients on the inner dimension requires a **psychological mindedness** founded on deep self-awareness.

Psychosynthesis perspectives on change and crisis

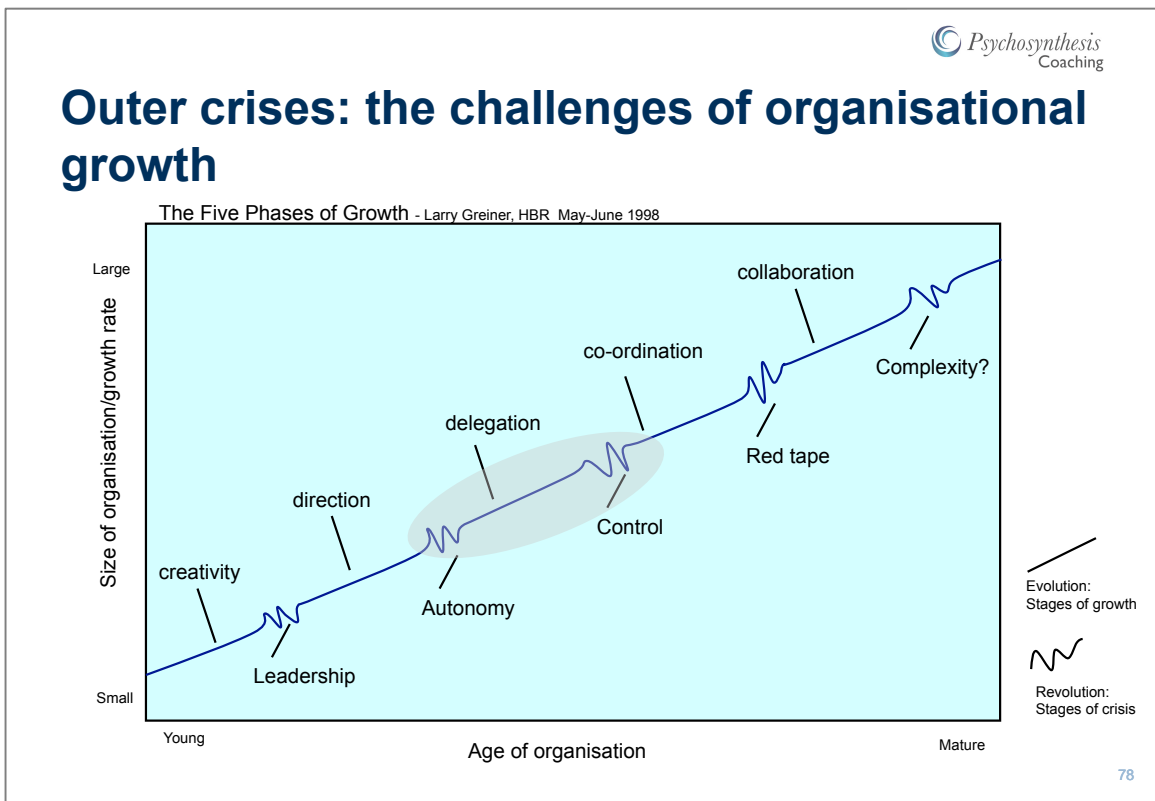
- ❖ Self-realisation and self-actualisation: crises of duality and meaning
- ❖ Spiritual awakening through peak experiences or crisis
- ❖ Assagioli's four stage model of spiritual awakening
- ❖ Crises of transition between developmental stages
- ❖ How Crisis manifests in organisations – inner and outer

Assagioli's four stage model of spiritual awakening

1. **Crisis preceding awakening** (life lacks meaning)
2. **Crisis of awakening** (things may never be the same again, you can't hold things in the same way)
3. **Reactions to awakening** (e.g. inflation and mystic flight or denial and suppression)
4. **Integration** (grounding, bringing energies down into the personal from the transpersonal)



Engagement with change client agendas



Coaching profession

Introduction to Professional Bodies: ICF, AC, EMCC and APECS

APECS: <https://apecs.org>

ICF: <https://www.coachfederation.org.uk>

AC: <http://www.associationforcoaching.com/pages/home>

EMCC: <http://www.emccouncil.org>

Coaching at Work: <http://www.coaching-at-work.com>

ICF Core Competencies Rating Levels: www.coachfederation.org

The APECS Seven Pillars and Standards Framework

1 PRACTICE in Executive Coaching

The First Pillar is to have established a Practice itself. A 'Practice' is a track record of evidence demonstrating what you deliver, and its link to output for the user. It may be described in terms that the user uses to understand the results, or even the 'agenda' for the Coaching work. The world of real Practice is different from the world of theory and research. It necessarily involves having to deal with circumstances which are not as neat and organised as a piece of research, or a nice simple comprehensive theoretical framework.

2 INQUIRY – Learning relevant to Professional Standards of Executive Coaching

The Second Pillar is about the Learning you have undertaken to do what you do. The Second Pillar is the record of how you learned to do what it is you do. It includes the need to have achieved important levels of learning required for Professional Standards of Practice. This is often referred to as the training you have received from those who already know what to do and how to do it. This is well possible in established professions. However, it is still emerging as an organised and straightforward process in Coaching.

3 LEARNING about Organisation and Business

The Third Pillar is Knowledge and Understanding about Organisation. The Coaching dialogue can be significantly enhanced if the Coach is able to tune in to the matters at hand. Although, as with our assumptions about people, there is always the risk of bringing false assumptions to the dialogue. There are a great many forms of organisation. Each such structure develops its own life and requirements for participation.

4 LEARNING about People

The Fourth Pillar is knowledge and Understanding about PEOPLE. In all our societies, we are still forming ideas about what people make of life, as well as being part of some organisation. There is a very wide diversity of available knowledge already for exploring and understanding this essential part of Coaching. It is also important to appreciate the Knowledge that is available – rather than just your own preferences, so as to recognise and appreciate your own boundaries.

5 ARTICULATION of your Personal Coaching Practice

The Fifth Pillar is the Practitioner's 'Practice Model.' A Practice Model is the very personal mix of how any Coach builds up their own particular style and emphasis of how they do what they do – knowing what they can do, as well as helping to identify where their own personal Practice boundaries may exist. Experienced practitioners typically refer to using an integrated approach – that may draw on a range and mix of different frameworks to describe how they build their overall practice.

6 REGULATION – CPPD, Supervision, Ethical and Competent Practice

The Sixth Pillar concerns Checks and Balances to ensure continued effectiveness. These Checks and Balances are a normal part of Professional standards. They typically involve Supervision; Continued Professional Development and commitment to ethical standards and awareness, and respect for professional boundaries in Practice.

7 SOCIETY – Contribution to the Professional Community

The Seventh Pillar is involvement with an established Professional Community. Membership, by itself, of a Professional Community can be an important and simple method for a user / Coachee to believe they can trust that the Coach does know what they are doing. Professionals can be trusted to get it right. The term, Professional, is often used by people in the Coaching Field to give this sort of promise. This term, Professional, can carry some very positive reputation in the wider community.

Reflective and challenging questions

- Which primary perspectives (i.e. four quadrants) do you take most easily in your coaching work? Which do you tend to exclude? What could be the impact or consequences of this?
- How might you use Wilber's model with clients? How could it help them in their leadership?
- Which leadership paradigms do you recognise in your own worldview and way of thinking? Where is your centre of gravity? Do you recognise any transitions between thought paradigms, either now or in the past in your life?
- What does leadership mean to you? What is your concept of good leadership?
- Are you a leader? If so, of what or of whom? What would you say is your style of leadership?
- Why is coaching leaders important today? Why is it important to you?
- Reflect upon a recent experience of change that involved strong emotions and map it against the Kubler-Ross change curve – how well does it describe the overall experience? Does it help make sense of the experience for you? Then map it against Bridges 3 stages of transition. Can you see the stages? In what ways are these models useful to you in reflecting upon your change experience?
- What is your personal experience of crisis? Have you experienced a major crisis in your life? How do these concepts or models help you make sense of crisis?
- Review (or complete) your assessment of your competencies from the last unit. Which have you been developing? In what ways have your skills been improving? Which do you need to focus on in your development?

Core texts

Laloux, Frederic (2014), 'Reinventing Organisations'

Introduction and Part 1 (pages 1-51) will give you the foundations you need to understand this perspective. Parts 2 and 3 brings the Evolutionary paradigm to life with some interesting case stories/examples, but they take time to read and are not essential for now.

Downey, Myles (2014), 'Effective Modern Coaching: The Principles and Art of Successful Business Coaching'

Chapter 10 (pages 123-136) provides another way of explaining Wilber's integral model in relationship to coaching, and may make it more accessible!

Recommended further reading

Jaworski, J. (1996) "Synchronicity: The Inner Path of Leadership"

This is a personal story book (that really influenced my view of leadership) and really deserves to be read in its own right. Suggest you put aside for a holiday or when you have time.

Oshry, Barry (2007), "Seeing Systems"

This also needs to be included as a whole, although it is quite accessible (lots of graphics) and can be dipped into

Further references

Beck, Don and Cowan, Chris. (1996) "Spiral Dynamics"

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Kegan, R. and Lahey, L. L. (2009) "Immunity to Change"

Rooke, D. and Torbert, W.R.: Seven Transformations of Leadership, HBR April 2005

Senge, Peter, et al (2005) "Presence: Exploring Profound Change in People, Organizations and Society"

Shaw, P. (1997) "Intervening in the shadow systems of organizations: consulting with a complexity perspective, Journal of Organizational Change Management; Vol 10 No 3 '97

Starkey, Ken and Hall, Carol (2012) - The Spirit of Leadership - Chapter in New Directions in Leadership Education (HBR Press)

Whittington, John (2016, 2nd Ed): Systemic Coaching & Constellations

Wilber, K. (2000) "A Theory of Everything"