INNOVATIVE LEADERSHIP WORKBOOK FOR EXECUTIVES

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

MAUREEN METCALF  MARK PALMER

Companion to the 2012 Award Winning Innovative Leadership Fieldbook
A practical guide using comprehensive assessments and practices that develop a balanced integral leadership approach critical for these quickly changing times.

*Jim Grote, Founder, Donatos and the Grote Companies*

This workbook takes an insightful journey through the five stages of innovative leadership development—with a fresh perspective. Leaders will find a comprehensive set of tools to help them personally develop and, also, to coach their employees’ development. The insight has helped me dramatically improve productivity and effectiveness among the leaders working for me.

*Andrew Manzer, President and CEO at Schuyler Hospital*

The Innovative Leadership Workbook for Executives offers a fresh perspective and thoughtful approach on leadership that helps leaders align their actions with an organization’s culture and systems. This alignment is critical in successfully transforming organizations and implementing sustainable change in a complex environment.

*Michael Bills, Executive Director Innovation Initiative*  
*Fisher College of Business, The Ohio State University*

As the Innovative Leadership Workbook for Executives so artfully points out, ‘true leaders are both born and made—our leadership skills evolve as we grow.’ Had I had insights from this book earlier in my career, including my first CEO role, my leadership development would have been significantly accelerated, helping me better navigate new challenges. Nevertheless, I’m happy to have it now!

*Mike Sayre, President and COO at 2Checkout.com*
The Innovative Leadership Workbook for Executives is the perfect blend of important information and personal exploration. Several times, I put the book aside to take stock of who I am today and who I want to be tomorrow. As a leader or leadership coach, The Innovative Leadership Workbook for Executives is a “must have” for your personal development and your clients. Beautifully written, academically brilliant, and masterfully designed, the Innovative Leadership Workbook for Executives leads readers on a path to become a better leader and a happier person.

_Mike Morrow-Fox, Vice President for Human Resources and Talent Development at the Great Lakes Affiliate of the American Heart Association_

The Innovative Leadership Workbook for Executives offers important insight and gives needed information that would be of great help to leaders of every discipline. It offers a comprehensive set of tools and extensive case studies, and gives examples from real executives who have applied this program with success. The combination of theory and application make this a must-read leadership book.

_Kamal Aboshamaa, Vice President, R&D, Bolthouse Farms_

In today’s dynamic world, leaders have the incessant challenge to empower themselves and their organizations to operate with clear direction and purpose. The Innovative Leadership Workbook for Executives enables you to do just that. This tool provides a framework and techniques to formulate a laser focus on setting goals related to your vision and aligning to this purpose. The broader Fieldbook remains a must read for understanding the comprehensive journey while the Workbook is a stellar addition to help leaders dynamically navigate the “north star” in a concise and practical manner.

_Kathleen, Financial Services, Technology Executive_
INNOVATIVE LEADERSHIP WORKBOOK FOR EXECUTIVES

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

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 merely directional solutions without enough information for leaders to make measurable change. We know that leadership plays a critical role in an organization’s long-term success, while innovation has often proved to be a strategic necessity in today’s business environment. In short, both are more impactful today than ever before. Technology and increased access to information continue to accentuate their roles, yet organizations are often too overrun with change to channel them properly.

In effect, 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 your own leadership skills. It is fundamentally about leadership, yet equally an account of applying innovation. Leadership needs innovation the way innovation demands leadership; by marrying them we can improve our capacity for growth.

Approaches to both are explored by providing exercises designed to enhance your leadership awareness and skills. Even so, meaningful advancement in either area must ultimately 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 tangibly favorable changes.

At the same time you must also diligently address some challenging limitations. Many conventional applications of leadership and innovation often prove vague or partial, and even problematic in real-world scenarios. For example, if the leadership team of a struggling organization drives initiatives that focus solely on innovations 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 turnaround. Productivity and system improvements are undoubtedly critical, but so are employee experience and team engagement. Innovating products and improving functionality at the expense of also creating a better environment and supportive culture may appear sufficient for the short term, but will eventually produce lopsided decision-making and shortsighted leadership with lasting adverse consequences.

Knowing that the future of organizations is irreversibly 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 other aspects of your business.

**Marrying Innovation and Leadership**

Let’s explore innovative leadership in more tangible ways by defining it in practical terms. This, of course, begs the obvious question: what does innovative 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 company performance.

Even if initially useful, such approaches are still, essentially, formulas for imitating leadership, and are therefore likely ineffectual over the long term. Innovative leadership cannot be applied as a monolithic theory nor 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 much more 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 individual 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, culturally, behaviorally and systematically throughout the organization.
Notice here that in addition to linking leadership to innovation, we’re also relating to them as an essential part of our own 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, cultural, behavioral and systematic events. These same core dimensions that ground leadership and innovation also provide a context and mirror for your own total experience in any given moment or occasion.

Optimally then, leadership involves influencing through an explicit balancing of core dimensions that define our experience of everything we know. And innovation naturally follows as the force of creative advancement to ensure a basic alignment of those core parts.

Thus, inside our very own experience, leadership and innovation are innately connected, and share a deep commonality with our innate capacity for growth. This approach allows us to ground and articulate them together from a place intrinsic to our own basic experiences, rather than imitating techniques that take us away from that basic intelligence. Because knowledge is internal, dynamic personal development required to lead and create transformative change can become an actuality.

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 personal, cultural, behavioral or systematic, are inextricably interconnected. If you affect one, you affect them all.

Innovative leadership is based on the recognition that those 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 a company’s value system over the next five years, you will also affect personal motivations, company culture, and behavioral outcomes. Influencing one aspect—in this case, functional systems—affects the other aspects, since all four mutually shape that given occasion. To ignore the mutual interplay of any one of the four dimensions misses the full picture. You can only build innovative leadership by addressing reality in a comprehensive fashion.

Innovative leadership grows 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, innovative leadership is the type of 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 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 key dimensions: individual, culture, action, 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 respond more effectively to challenges within and outside the enterprise. Innovative 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 theory, 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 our 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 enact 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:

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

**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/or choices that brought you to where you are professionally and personally?
- How did these events/choices contribute to you 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 experience 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 below:

<table>
<thead>
<tr>
<th>AGREEMENT</th>
<th>RELATED ACTION OR BEHAVIOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Be fully present</td>
<td>Let go of thoughts about other activities while you read. Bring your full attention to the work</td>
</tr>
<tr>
<td>2. Take responsibility for your own success</td>
<td>Act as though you are 100% responsible for the outcome of your engagement with this material</td>
</tr>
<tr>
<td>3. Participate as fully as possible</td>
<td>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</td>
</tr>
<tr>
<td>4. Practice good life management</td>
<td>Invest time at scheduled intervals to work on the materials when you are mentally and emotionally at your best</td>
</tr>
<tr>
<td>5. Lean into optimal discomfort; take risks without overwhelming yourself</td>
<td>Be candid, open, and direct. Allow yourself to be curious and vulnerable</td>
</tr>
<tr>
<td>6. Take the process seriously, and more importantly take yourself lightly. Make this positive and rewarding experience</td>
<td>Allow yourself balance. Find the learning and humor in both your successes and mistakes. Most importantly, have fun!</td>
</tr>
</tbody>
</table>
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 the chapter through 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 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 during the past three months:

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.

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.

3. I have a reflection practice where I understand, actively monitor and work with my “fixations” (a fixation is a negative thought pattern).

4. I have a clear sense of who I am and what I want to contribute in the world.

5. I manage my emotional reactions to allow me to respond with socially appropriate behavior.

6. I am aware of what causes me stress and actively manage it.

7. I have positive coping strategies.

8. I actively seek ways to feel empowered even when the organization may not.

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 during the past three months:

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 in service of meeting our goals and improving the service we provide to our customers. 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 during the past three months:
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 during the past three months:
Never (1)  Rarely (2)  Sometimes (3)  Often (4)  Almost always (5)

1. I am aware of my own passions and values.
2. My behavior consistently reflects my goals and values.
3. I feel safe pushing back when I am asked to do things that are not aligned with my values.
4. I am aware that my behavior and decisions as a leader have a significant impact on the organization’s structure and culture.
5. I am deliberate about aligning the organization’s pay and performance systems with the types of behaviors we want to encourage (both results and behaviors).
6. The organization’s key measures and systems encourage the right actions aligned with the culture, and discourage actions that will damage the organization or make me uncomfortable.
7. I am aware of how my values align with those of the organization and where we are misaligned; I take steps to encourage changes in the culture such as talking about our values and reinforcing what we say we care about.

Total Score

- If your overall score in this category is 21 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 22–27, you are in the healthy range, but could still benefit from some focus on alignment.

- If your score is 28 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 during the past three months:

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. Depending on role, this may happen primarily in my personal life.

2. I focus on creating results in a way that encourages others to grow and develop while accomplishing their tasks.

3. I think about the impact of my actions on the overall organization rather than just getting the job done.

4. I see how my work contributes to the overall organizational success and deliberately try to improve myself and the organization.

5. I take time to mentor others—even when I am busy.

6. I consider myself a personal learner because of the time I spend reading and trying new ideas and activities. I am curious.

7. I have the courage to speak out in a professional manner when asked to do something I disagree with.

8. I accomplish results by working with and through others in a positive and constructive manner.

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**Total Score**

- If your overall score in this category is 24 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 25–31, you are in the healthy range, but could still benefit from some focus on your leadership behaviors.

- If your score is 32 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: Innovative Leadership Foundation

Figure 1-1 Five Elements of Innovative Leadership

The Importance of Leader Type

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 over 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 21st century unfolds, the most effective leaders will have a much more holistic view than at any other time in history. In the following chapters, we will define and describe each individual element of innovative leadership and how they interact together.

Leader Type

Part of the challenge in building innovative leadership is learning to become more introspective and how to put that introspective knowledge into practice. Looking inside yourself—examining the very makeup of your inner world—enables you to function in a highly grounded way, rather than operating from reactive habits and biases that simply lead to more uninformed or unconscious decision making.

First and foremost, when thinking about leadership, start by simply considering your own personal disposition, tendencies, inclinations, and ways of thinking and acting. Remember, cultivating innovative leadership involves exercising your innate intelligence and hinges on understanding the simple manner in which you show up in your life. One way to observe this is by examining qualities intrinsic to your inner being, described as types, which reflect the basic makeup of your personality. The Leader Personality Type (referred to going forward as leader type) plays a critical role in how you see the organization and also how you provide guidance. It is an essential foundation of your personal makeup and greatly shapes your leadership effectiveness. The ancient adage of “Know thyself,” attributed to various Greek philosophers, holds true as a crucial underpinning of 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.

Again, it is important to keep in mind that this particular notion of type is something that is inherent to your very being. In other words, generally speaking, type 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. 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.

—Deep Living, Roxanne Howe Murphy

Learning at this deeper level about your own inner dynamics can offer remarkable insights about areas of life that, in your own personal experience, you may either exaggerate or underemphasize.

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, or perspectives, as a key element in building 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 shaping innovative leadership. Author Jim Collins, for example, referred to Level 5 Leadership in his best-selling business book as an example of developmental perspectives applied to leadership. While we do not cover the relationship of Level 5 Leadership to developmental perspectives, you can find more information on this subject in the Innovative Leadership Fieldbook.
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 type determines your style of leadership, good leaders also develop their perspective or capacity for greater meaning-making over time. Thus, 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 tends to change, and is an important differentiator in leadership effectiveness.

Let’s use a model to help exemplify the notion of leader development. This will allow us to further differentiate developments and changes in perspective from what should be accepted as aspects that are part of your 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 an important consideration 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.
The developmental perspective approach is based on research and observation that, over time, people tend to grow and progress through a number of distinct stages of awareness and ability. One of the most well-known and tested developmental models is Abraham Maslow’s “Hierarchy of Needs.” Maslow created a pyramid showing levels of human needs, both psychological and physical, to help explain his Hierarchy of Needs. As you ascend the pyramid, you eventually reach a level of self-actualization.

Developmental growth occurs much like other capabilities grow in your life. Through the nuances of your leader type, you continue to grow, increasing access to or capacity for additional skills. We call this pattern of development “transcend and include,” where you transcend the prior level/perspective while still retaining 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 behaviors 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 lives. 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 building innovative 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. We recommend reading the Innovative Leadership Fieldbook for a more detailed analysis of developmental perspectives.

**Resilience**

There are two distinct ways to understand resilience. First, using an engineering definition, resilience is 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 innovative 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](image)

The underlying premise of resilience is simply this: as a leader, you 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, 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.
Interestingly, the leaders we work with generally 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; you will make choices for your resilience and personal health or against it. 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.

**Situational Analysis**

Though much 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 the constant 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 all dimensions are aligned, resulting in balanced and efficient action. This balancing without favoring elements is an important skill for innovative leaders.

**Figure 1-5- Integral Model**

Leaders often take a partial approach to changing organizations—they overemphasize 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. A multi-dimensional approach provides a more complete and accurate view of events and situations, and enables you to create alignment across the four dimensions on an ongoing basis.

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 them, shown in Figure 1-5, 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, “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 company’s intranet to check the latest sales numbers within the company’s several international markets.

In applying situational analysis to organizational change, you would be aware of these four dimensions referenced above, recognizing that all events play out simultaneously and impact one another. If you get promoted and want to be perceived differently, how may your situation play out in each dimension similar to what is described above? How would you begin to integrate your total experience through exercising awareness in all four dimensions as you walk into the office building?

Thus, a crucial part of building innovative leadership is developing your capacity to be aware of all dimensions of reality in any given moment, which can help you to identify misalignments. Even though you cannot physically see the values, beliefs, and emotions that strongly influence the way an individual colleague perceives himself/herself and the world, or a group’s culture, emotional climate or collective perception, they still profoundly shape a leader’s vision and potential to innovate.

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

**Leader Behaviors**

Let’s now shift our focus to the actionable craft of leadership as defined by skills and behaviors. In this section, we are talking about observable leadership skills and behaviors, and hard skills and their associated behaviors. Both leadership skills and hard skills are critical to success, and serve as objective performance measures of innovative leadership.

Hard skills, comprised of knowledge and aptitude, typically fall into two primary categories: industry-related skills and functional skills. Leadership behaviors describe knowledge, skills, and aptitudes specifically related to applying leadership.

We will be using the term leadership behaviors in this workbook when referring to leadership
knowledge, skills, and aptitudes and their resulting behaviors. Both hard skills and leadership behaviors are critical to building innovative leadership; however, the balance between the importance of hard skills and leadership behaviors will shift as the leader progresses in the organization. Leadership skills and behaviors become increasingly important with career advancement.

Leadership behaviors are important because they are the objective actions a leader takes to 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 behavior drives organizational success; conversely, ineffective leadership behavior drives organizational dysfunction or failure. Even the most functionally brilliant leader who masters individual performance must employ a different application of decision-making to demonstrate effective leadership behavior that drives organizational success.

An example of the need for both hard skills and leadership behaviors is a hospital CEO client. To be successful, the CEO must possess the hard skills implicit to hospital administration, understanding how the hospital operates, and the leadership behaviors required to maximize efficiency and functionality. If either of these sets of skills is missing, the leader and the hospital are at risk of failure. Early in his career, a mastery of hospital administration set him apart from his peers. As he progressed into the senior leadership ranks and ultimately to the role of CEO, his use of leadership behavior became his primary focus, but he never lost the need for hard skills; he still relies on those functional skills to guide his leadership direction and action.

There are several different ways to discuss leadership from a skills perspective, as demonstrated by Peter Northouse’s recent 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.*


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

**Developing Innovative Leadership**

The next six workbook chapters walk you through the process of developing innovative leadership. Each chapter reflects one step in the development process and includes tools, templates, reflective questions, and an example of a person who has completed the process. It is the comprehensiveness of this reflection, coupled with the exercises, that will provide you with insight into yourself and
your organization, insight that is essential to navigating growth and managing change in both. It is important to note that leadership development is an ongoing process, and that, while you will be more effective upon completion of this process, you may find that you still have more work to do, depending on your goals. Figure 1-6 below shows the six steps.

Figure 1-6 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 originally thought were mastered. 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 working with this tool, you will find insight coming to you at every step of the way. We encourage you to continue to test your ideas and feel comfortable returning to earlier parts of the process for further refinement.

The time you spend with this workbook is an investment in your own development. If you are engaging deeply in that process, it will likely take you three to six months or longer to complete. Whether managing personal, internal, or broader organizational change, deep 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 what 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 2: 
Create a Compelling Vision

The Innovative Leadership Workbook for Executives is designed to provide a step-by-step process to support you in developing your own innovative leadership capacity. This workbook has been tested with clients as well as hundreds of working adults participating in an MBA program.

You are starting on the first step in the process to Create a Compelling Vision of Your Future. The full process is shown below:

1. Create a Compelling Vision of Your Future
2. Analyze Your Situation & Strengths
3. Plan Your Journey
4. Build Your Team & Communicate
5. Take Action
6. Embed Innovation Systematically

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.

These tools differ from many others by directing you through an exploration that accounts for 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 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. 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 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 and your organization or 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 the sufficient desire, solid vision, and an 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. 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. You will find journal pages at the end of this chapter for your answers.

**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 you are most proud of?
- Did you have a family?
- What would your family 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 answers to the questions in Step 1. 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 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 as a person, write a two to five sentence life purpose statement—a statement that talks about your highest priorities in life by which you are inspired. If it captures the essence of how you want to live your life and project yourself, then it is good.

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, however, are clarified 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.

**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 to bring your list down to three. Which one item on the list do you care most about?

**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, exactly? What are you expecting from yourself, even in bad 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?
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
- Fast living
- Fast-paced work
- Financial gain
- Freedom
- Friendships
- Having a family
- Health
- Helping other people
- Honesty
- Independence
- Influencing others
- Inner harmony
- Integrity
- Intellectual status
- Leadership
- Location
- Love
- Loyalty
- Meaningful work
- Money
- Nature
- Openness and honesty
- Order
- Peace (tranquility)
- Personal development/learning
- Pleasure
- Power and authority
- Privacy
- Public service
- Recognition
- Relationships
- Religion
- Reputation
- Security
- Self-respect
- Serenity
- Sophistication
- Spirituality
- Stability
- Status
- Time away from work
- Trust
- Truth
- Volunteering
- Wealth
- Wisdom
- Work quality
- Work under pressure
- Other: __________
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 enjoy 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 personal 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 for you. We find that revisiting allows you to nurture your 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.

**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? 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 is 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 professional skills afford 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 (ex. 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 2-1 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. We recommend you answer one to three questions from each category.

### TABLE 2-1: REFLECTION QUESTIONS

**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 company, 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 the 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 we 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 to these goals? Is my behavior supporting the organizational goals? Are the organizational goals supporting my goals?
Introduction to Jill

At age 42, Jill has joined a global consulting firm as a Partner. On a daily basis, she is involved in helping leaders and their organizations become more effective and sustainable, and act responsibly as positive corporate citizens. To help illustrate these reflection questions, we’ve included Jill’s answers. We have tried to capture her internal thought process in these exercises in a way that is rare in a business context, but helpful for the purpose of personal development. We will now walk through answers to one or two questions from each section of Table 2-1. Simply follow along with Jill to answer the questions for yourself, or select the questions that fit your current situation.

What do I think/believe?

How do I see myself in the future?

I see myself as a person who can significantly contribute to helping leaders and their companies function more effectively and sustainably. For me, this includes: providing reliable products and services to customers at a fair price; paying workers fairly and providing benefits where possible; paying stockholders or owners a fair return for their investment and risk; making a positive impact on the communities in which I operate. I believe that how I behave while accomplishing this goal is very important. I am committed to being wise, compassionate, peaceful, fair, open-minded, honest, grounded, and trustworthy. I take time to develop my employees and serve my community through my professional and volunteer activities. I also hold a strong spiritual faith that gives me peace and a sense that there is some order in the world, even if I do not see it personally.

There are parts of my vision that I am not sharing here. They include my spiritual goals, physical fitness goals, and family goals. While I believe these are all critical to living a balanced and happy life, I am not sharing them in this journal because they are very personal to me.

How does my view of myself impact me? Am I inspired by my vision? Terrified?

I am definitely inspired by my vision. If I accomplish what I see as my vision of the future, I will leave the world, its people and its planets better for my presence. This legacy involves businesses, individuals, and the community. My work touches all of these sectors directly. I am proud of my vision, and it tends to drive me forward.

I’m aware of my skills and talents, as well as my deficiencies. At times, I probably see the deficiencies as bigger than they are, and the strengths as things anyone can do. I realize that this distorted perception clouds my judgment, even if it is on the side of humility. Through my regular meditation, journaling, and work with my coach, I am making a conscious effort to value myself more accurately. I have understood that if I undervalue myself, I will not set a realistic vision, and will never reach my potential. If I overstate my abilities too much, I may get discouraged and stop short of my potential. Or maybe I will actually grow more—who knows?
How do I see myself within the larger environment? This can range from my family, the company, to the global environment?

I see much of my contribution to the world happening through my paid and volunteer work. I work for a global consulting firm that is focused on organizational improvement and sustainability. I want this organization to make a significant impact on how client organizations operate responsibly in a manner that allows them to be profitable and also tend to the environment. If we are successful, we will impact people on all parts of the planet.

Beyond my work vision, I see myself as a person who respects each individual with whom I come into contact. I see my work and my kindness impacting the world in a positive way.

What do I do?

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

My vision is evolving after wondering what I should really do with my life. I continually get external feedback from my husband, colleagues, friends, and clients about what seems to be working and what isn’t. This feedback can come in the form of recognition, frustration, or praise. Some information comes from within. At this point in my life, I tend to be very introspective and am listening to my own inner guidance a great deal. I make time to think, reflect, and pay attention to my thoughts and feelings, allowing me to evaluate whether I am doing what I want to do and being the person I want to be. Meditation is an important practice for me because it provides a structure and time that promotes reflection, clarity, and peace of mind. I am finding this quite helpful, but am also aware that many people believe they are following their inner guidance, yet have significant blind spots that interfere with clear, well-aligned actions. I check in with those I trust to make sure I stay grounded and realistic.

How do I synthesize the 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)?

I have gone through a very deliberate process to create a vision for myself and my personal contributions. It is ongoing rather than a one-time activity. While some people may grow up knowing what they wanted to do in the world, I did not. What I am doing now did not even exist when I was a child.

I believe that we benefit from refining, if not significantly revising, our vision as we continually learn and grow. I found my own vision to be constantly changing and growing rather than being static. My visioning process is a combination of what appears to be opposing activities: creating a plan, but being willing to change the plan as I learn more. I plan and periodically revise my vision. In this way, “vision” becomes something more organic that reveals itself over time. I like this approach because I could not have selected my current vision even 10 years ago, as I would not have been able to predict what would be happening in my life or what opportunities I would have.
So… I think of creating my vision as similar to the flow of waves—some information coming in and some reaction to it going out. I always gather information from those around me. I experiment with new behaviors or new ideas. As I experiment, I gain more information. In responding to the information, I refine who I am. This self-reinforcing cycle repeats as I continue to learn and refine. This learning cycle has given me an opportunity to make great progress in areas I would never have imagined.

**What do we believe?**

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

Mathew, my husband, is very supportive of my vision; we share similar values. Doing these and similar exercises over the years have helped us to strengthen our foundation as a couple.

My personal vision is highly aligned with my organization. It is evolving, and the leadership team is very mindful of our collective culture and values and how they impact the organization. As it grows, we are taking more time to ensure that we listen to the values and concerns of others, and integrate them into the company beliefs. We find that people of similar values are attracted to our company and those who differ significantly simply are not.

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

We stand for creating effective, sustainable organizations that serve as positive global citizens (act responsibly). We have created a set of guiding principles that define how we will work together. My values are well aligned with these guiding principles. The challenge for us will be preserving the effectiveness of those principles through appropriate attention to them as we continue to grow. We want to do this without creating onerous burden or unnecessary structure.

**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?*

Part of my feedback comes from my husband, Mathew. I really trust his judgment. He has my best interest at heart and is willing to give me candid feedback. He has been focused on his own development for many years, so he has a strong sense of what I stand for.

For my business, I look at standard performance measures such as growth and profitability. I’ve also decided to use a 360° assessment tool (providing me with feedback from my boss,
my peers, and my staff) that measures individual performance and organizational culture. We will implement this assessment this year. It will provide us with valuable information about how we are working as a leadership team and will give me important feedback about how others perceive my behaviors. Because it is a 360° assessment, I will see how people at different levels within the organization see me.

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

I review my progress annually in December. This discipline helps me maintain sufficient focus on my progress while giving me time to do the other activities in my life. During this process, I decide if my vision and values should be refined. I also look at my performance against business and personal goals. I review my journals to remind me about how the year has gone.

The company has an annual planning process where we evaluate our progress during the past year against high-level goals. We then confirm our mission, vision, and values, or refine them as appropriate. Once clear, we create goals and define success measures for the upcoming year. This process includes an “external scan” where we consider customer input, employee input, economic trends, and forecasts.

Your Process of Creating a Compelling Vision

Now that you have read Jill’s personal narratives, it is time to complete the exercises and answer the questions for yourself using the journal pages at the end of this chapter. 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.

Resources

Video lessons and worksheets on-line: http://elcircle.com/innovativeleadership.com
EXERCISES

Define personal vision

...
Define personal vision
What do I think/believe?
What do I do?
What do we believe?
REFLECTION QUESTIONS

How do we do this?
References


Author Bios

**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.

**Mark Palmer**

Mark is a Principal with Metcalf & Associates, Inc., a professional services firm specializing in leadership development, team building, and organizational effectiveness. Mark is a founding member of the Integral Institute, an international think-tank created to combine progressive academic research with practical applications in the public and private sector. He is an accomplished teacher, has conducted numerous seminars and lectured extensively on business leadership supported by social theory. Mark has also taught several online courses and served as the institute’s Program Director for Integral Practice.

Mark Palmer is a writer, editor, and full-time professional specializing in Organization and Social Science research; he is also a pioneering expert in the design and application of Innovative Leadership. His background includes Economics, Social and Behavioral Theory, Cultural Studies, and Anthropology.

Mark is an expert on the theoretical work of American born philosopher Ken Wilber, and has written extensively, for private circulation, on the application of Wilber’s work to numerous disciplines. He was the senior editor of “The Simple Feeling of Being: Embracing Your True Nature” published in 2004 as a compilation of Wilber’s work spanning 25 years.

Mark is also the head of Store Development Research and GIS Services for Wendy’s International, Inc., providing strategic planning to support senior and executive management.
Thank you for reading!

Thank you for taking the time to read the Innovative Leadership Workbook for Executives. I trust the worksheets and reflection questions you completed here will help you become a more effective leader. Do you have any suggestions for additional tools and templates we can provide? If so, please contact me at:

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This is the first in a series of workbooks. Subsequent workbooks will be written for emerging leaders, non-profit executives, public service executives, and more. Download other titles on Innovative Leadership at www.innovativeleadershipfieldbook.com.
A practical guide using comprehensive assessments and practices that develop a balanced integral leadership approach critical for these quickly changing times.

Jim Grote, Founder, Donatos and the Grote Companies

This Workbook takes an insightful journey through the five stages of innovative leadership development—with a fresh perspective. Leaders will find a comprehensive set of tools to help them personally develop and, also, to coach their employees’ development. The insight has helped me dramatically improve productivity and effectiveness among the leaders working for me.

Andrew Manzer, President and CEO at Schuyler Hospital

The Innovative Leadership Workbook for Executives offers a fresh perspective and thoughtful approach on leadership that helps leaders align their actions with an organizational culture and systems. This alignment is critical in successfully transforming organizations and implementing sustainable change in a complex environment.

Michael Bills, Executive Director Innovation Initiative Fisher College of Business, The Ohio State University

As the Innovative Leadership Workbook for Executives so artfully points out, ‘true leaders are both born and made—our leadership skills evolve as we grow.’ Had I had insights from this book earlier in my career, including my first CEO role, my leadership development would have been significantly accelerated, helping me better navigate new challenges. Nevertheless, I’m happy to have it now!

Mike Sayre, President and COO at 2Checkout.com

The Innovative Leadership Workbook for Executives is the perfect blend of important information and personal exploration. Several times, I put the book aside to take stock of who I am today and who I want to be tomorrow. As a leader or leadership coach, The Innovative Leadership Workbook for Executives is a “must have” for your personal development and your clients. Beautifully written, academically brilliant, and masterfully designed, the Innovative Leadership Workbook for Executives leads readers on a path to become a better leader and a happier person.

Mike Morrow-Fox, Vice President for Human Resources and Talent Development at the Great Lakes Affiliate of the American Heart Association

The Innovative Leadership Workbook for Executives offers important insight and gives needed information that would be of great help to leaders of every discipline. It offers a comprehensive set of tools and extensive case studies, and gives examples from real executives who have applied this program with success. The combination of theory and application make this a must-read leadership book.

Kamal Aboshamaa, Vice President, R&D, Bolthouse Farms

In today’s dynamic world, leaders have the incessant challenge to empower themselves and their organizations to operate with clear direction and purpose. The Innovative Leadership Workbook for Executives enables you to do just that. This tool provides a framework and techniques to formulate a laser focus on setting goals related to your vision and aligning to this purpose. The broader Fieldbook remains a must read for understanding the comprehensive journey while the Workbook is a stellar addition to help leaders dynamically navigate the “north star” in a concise and practical manner.

Kathleen, Financial Services, Technology Executive