



# INNOVATIVE LEADERSHIP FIELDBOOK

Field-Tested Integral Approaches to Developing Leaders,  
Transforming Organizations and Creating Sustainability

MAUREEN METCALF



MARK PALMER

## ***Praise for the 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 Fieldbook 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 both personally develop and also to coach their employees. 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 Fieldbook* offers a fresh perspective and thoughtful approach on leadership that helps leaders align their actions with the 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 Fieldbook* 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 Fieldbook* 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 Fieldbook* is a "must have" for your personal development and your clients. Beautifully written, academically brilliant, and masterfully designed; The *Innovative Leadership Fieldbook* 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 Fieldbook* 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 examples from real executives that 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***



The *Innovative Leadership Fieldbook* tackles the complex topic of leadership and makes it real, practical, and powerful for leaders in all walks of life. I have used elements of this approach in an organizational transformation and found it delivered significant positive results. This book explains the key domains of leadership required for complex change and how to build them in yourself and your team.

***Rob Richardson, CIO Large Global Manufacturing Firm***

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# PREFACE

## Re-Visioning Leadership and Innovation

You've enhanced your productivity by adopting new technology. You've streamlined your operations and aligned your teams, meticulously implementing the details of your strategic plan. You've fully invested to better innovate the way you run your business. But have you invested in the innovation of your leadership? Are you getting the business results you need to thrive?

Without question, today's organizational challenges have made recurrent innovation a requisite part of your business. As you are well aware, applying innovative strategies can be exhaustive, spanning everything from process and products to marketing, acquisitions and customer experience. Decisions involving innovation will often be among the most influential choices executive teams ultimately make toward a company's future outlook.

Yet despite its broad applicability, most innovation is largely geared toward enhancements in technology, such as developing better goods and services or redesigning system functionality. Though good management teams implicitly understand the importance of boosting system performance, very few of them comprehend the need for innovation within an equally crucial yet often overlooked dimension of their core business: *their leadership*.

More specifically, companies often seriously neglect the ways in which their leaders actually relate with the organization, envision strategy, and most fundamentally, steward their own personal and professional growth. The way you, as a leader, perceive your business is itself an untapped opportunity for innovation. Streamlining the way your business works is essential, but merely innovating the functionality of your systems can only address half your issues. Even worse, it can blind your strategic vision concerning performance improvement and operational excellence.

How did such a broad notion as innovation get reduced to technological advancement and piecemeal strategies that focus solely on improving functional systems?



### ***An Ever-Changing Organizational Climate***

Simply consider today's vast operating complexities, as well as their egregious by-products stemming from twenty years of accelerated globalization, market volatility and advanced commoditization. Escalating uncertainty and resulting economic decline have become staggeringly familiar. Companies struggle to match their past performances with considerably fewer resources. Entire segments, and in some cases entire industries, once thriving a mere decade ago, are now experiencing immense decline.

In short, the current state of organizational climates is wildly ambivalent. The assertion of unlimited growth and wealth appears unlikely, at best. Resembling Darwin's "survival of the fittest," market forces pressured the fate of organizations, generously rewarding executive teams that adapted while dispassionately retiring the less successful. Even in cases where business innovations enhance the bottom-line, success is often a short-term outlook.

But here's the glaring irony of the situation: the accelerated growth of technological innovation eventually created an increased need for it; never mind that most of those emerging innovations were largely experimental to begin with. The near exponential drive of tech innovation, fueled largely by a need for competitive relevance, contributed to conditions that produced hostile operating environments. Interestingly, it wasn't a lack of innovation that fed instability across markets, since the need for it took on increased urgency. Though technology innovations, at least in theory, largely improved business efficiency, they also compounded competitive pressures, which accelerated production and increased services, which further decreased business-time horizons, and so on. In summary, continual advancements in systems efficiency, driven by evolving technologies, developed at an unprecedented rate and caused accelerating disruptions in every sector.

The ensuing fallout has proved deeply problematic. Innovating functional efficiency has become the sole focus of strategy at the expense of leadership vision and cultural cohesion. This has created significant dissonance between an organization's purpose and day-to-day functioning. Companies focused their energies and resources on performance training, yet failed to foster sophisticated thinking, interaction, and comprehensive decision-making among their leaders. This has fed a common yet unsophisticated assumption that technical competency was somehow equivalent to strategic vision.

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The challenge of exploring and applying innovation is also a challenge to deepen your leadership. Your perspective as a leader, along with the cultural alignment of your team and organization, must keep pace with functional enhancements. Accelerated developments in technology extended through increased globalization created unexpected anomalies in market forces, leading to innovative solutions that were geared primarily toward streamlining systems. Unbridled growth in systems technology spawned one-sided innovation, all the while crippling advancements in strategic vision and cultural cohesion.

In essence then, conventional innovation has been reduced to merely improving an organization's functional processes. This one-sided version of innovation not only drove market volatility, it also marginalized new organizational strategies, particularly those emerging to navigate a recently flattened global economy. Companies were applying technology innovation to resolve issues that were created by primarily focusing on technological systems in the first place. In fact, entering the 21<sup>st</sup> century, nearly two-thirds of Total Quality Management (TQM) programs reportedly failed along with 70% of the reengineering initiatives aimed at fostering organizational stability (Senge, 1999, pp. 5-6). Leaders of the corporate reengineering movement report that the success rate for reengineer efforts for Fortune 1000 companies is below 50%, and possibly only 20% (Strebel, 2000, p. 86). Companies clearly needed innovation to traverse the new economic landscape, yet experienced little success since the solutions they sought were incomplete to begin with.

Based on these failures, today's organizational complexity requires you to seriously consider more comprehensive approaches to innovation and leadership. At some point, exclusively focusing on performance analytics concerning systems can prove costly. The opportunity to enhance your innovative capacity must extend beyond increasing functionality, which is crucial but incomplete when implemented alone. If, in addition to developing better functional processes, you begin to also clarify your vision, growing your leadership capacity, and building a cohesive company culture—you will achieve much greater and more sustainable success.

### ***The Opportunity of Innovative Leadership***

As we've discussed, the overwhelming focus of today's organizational solutions are almost entirely oriented toward system functionality. This is foundationally necessary, but 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 be supported by more balanced innovation, comprehensively aligning your vision, teams and systems by integrating enhanced leadership perspective with system efficiency.

This balanced approach to leadership and innovation is transformative, for both you and your organization, and can help you to respond more effectively to challenges exerted within and outside the enterprise. Innovative Leadership affords 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 an Innovative Leader***

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

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

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

TRADITIONAL LEADERSHIP	INNOVATIVE LEADERSHIP
Leader is guided primarily by desire for personal success and peripherally by organizational success	Leader is humbly guided by a more altruistic vision of success based on both performance and the value of the company's positive impact
Leadership decision style "monarchical;" leader has all the answers	Leader leverages team for answers as an adjunct to decision-making process
Leader picks a course in "black/white" manner; tends to dogmatically stay the course	Leader perceives and behaves like a scientist: continually measuring and testing for improvement
Leader focuses on being technically correct and in charge	Leader is continually learning and developing self and others
Leader tends to the numbers and primarily quantitative measures that drive those numbers	Leader tends to financial performance, customer satisfaction, employee engagement, community impact, and cultural cohesion

We invite you to explore this fieldbook as a way to innovate your leadership in a climate of vexing uncertainty and partial solutions. We introduce you to unique tools designed to help leaders and their organizations tackle unprecedented complexity. Drawing from numerous case studies and recorded interaction among executives, managers, and consultants, this volume is the summation of cutting edge insights and methods aimed at improving personal and professional development.

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# INTRODUCTION

## Innovative Leadership

Leadership and innovation are two of the most compelling topics in Organizational Development. Even so, and despite the volume of resources exploring both topics, most approaches provide directional solutions that are merely anecdotal. We know that leadership plays a critical role in a company's long-term success, and that innovation has become a strategic necessity in today's business environment. Both leadership and innovation are perhaps more impactful today than ever before. Technology and increased access to information continue to accentuate their roles, yet companies are often too overrun with change to handle the throng of emerging demands.

Still, ensuing questions on how to lead and where to innovate remain puzzlingly philosophical: What is the role of leadership in a time of looming uncertainty? How will companies 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 fieldbook is designed precisely to help answer those questions and perform a critical self-evaluation. Though its premise is fundamentally about leadership, it is equally an account of innovation. Leadership needs innovation the way innovation demands leadership, and by marrying them we can improve our capacity for growth.

This book explores a number of approaches to elaborate on both fields, not just conceptually, but tangibly by providing exercises designed to enhance your leadership skills. Most importantly, any meaningful advancement concerning both must originate from the leader. In other words, becoming a better leader and optimizing innovation jointly hinge on the leader authentically examining his or her inner makeup.

Even so, you must diligently address some challenging limitations. Despite their collective importance, conventional applications of leadership and innovation have often proved elusive and even problematic in real-world scenarios. For example: if the leadership team of a struggling organization drives initiatives that focus solely on making innovative changes to incentives, products and services, without also advancing strategic purpose and team solidarity, they will still miss the greater

potential to create a meaningful turn-around in company culture. Productivity and system improvements are undoubtedly critical, but how employees make sense of their work experience is equally vital. Implementing products and functionality at the expense of also creating a better team environment or a more supportive company culture often appears as lopsided decision-making and shortsighted leadership.

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 capacity for leadership. Empathy and the ability to inspire cultural alignment offer your organization significant merit, 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 ways that deeply resonate with the realities around you. Through deep examination and reflective engagement, you learn to balance the hard skills you have acquired with meaningful introspection, all the while setting the stage for further growth. In essence, you discover how to strategically and tactically innovate leadership the same way you innovate in other aspects of your business.

## ***Marrying Innovation and Leadership***

Let us explore innovative leadership in a more tangible way 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. Rather, it must take place through your own native intelligence and stem from your own unique sensibilities.

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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 directionally and tactically, affecting change in intentions, actions, culture and systems.**

Within this context and above all else, leadership is influencing: directional influence in the sense that it imparts inspiration toward others; tactical influence in the sense of employing functional execution.

Put differently: leadership influences an individual's intentions and cultures by inspiring purpose and alignment. It equally influences an individual's actions and organized systems by executing tactical decision-making.

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

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

Notice here that in addition to tying the relationship of leadership to innovation, we're also linking them as an essential part of our individual experience. Like leadership and innovation, the way you experience and influence the world is defined through a mutual interplay of personal, cultural, behavioral and systematic events. These core dimensions which ground leadership and innovation also provide the contextual summation of your total experience on any given occasion.

Optimally then, leadership is influencing through an explicit balancing of those core dimensions. In response, innovation naturally follows as a creative advancement of this basic harmony. Our personal experience, leadership and innovation are all innately connected, and share a deep contextual make-up.

Therefore, marrying leadership with innovation allows you to ground and articulate both in a way that can create a context for dynamic personal development.

**An Innovative Leader influences by engaging self, culture and systems equally.**

Though we are, in a sense, defining innovative leadership very broadly, we are also making a distinct point. We are saying that, in actuality, the core aspects that comprise your experience, whether personal, cultural, behavioral or systematic, are never mutually exclusive. If you affect one, you affect them all.

Innovative leadership is based on the recognition that those four aspects exist simultaneously in all experiences, and already influence every interactive experience we have. So if, for example, you implement a strategy to re-align 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 deny the mutual interplay of any one of the four aspects is missing the full picture. You can only build innovative leadership by addressing reality in the most comprehensively available fashion.

### ***Measuring Innovative Leadership***

We measure innovative leadership in two very distinct ways; we call these primary qualities **Capacity** and **Competency**.

**Capacity** describes a leader's ability to take another's point of view, and to communicate, influence, and drive the adoption of leadership principles throughout various levels of organizational culture. In this context, we are deliberately giving special attention to the more subjective qualities of innovative leadership, such as taking other perspectives and aligning organizational values. We are not yet considering aspects that are action or behavior-oriented, which include measures like performance, action or functionality. In essence, capacity describes areas like the development of complex thinking, the ability to take multiple perspectives, empathy engagement, leader type expression and personal resilience.



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**Capacity describes our ability to introspect, reflect and take the perspective of others. It is subjective.**

**Competency** accounts for a leader's overall proficiency in hard skills, functional expertise, and systems efficiency. In this case, we are exploring innovative leadership as applied to performance, execution and systems. Competency, in this context, is simply proficiency in the business of your organization; it entails all areas of the enterprise that require skills shaped by mostly objective or quantitative measures, such as management acumen and systems execution. Most available resources describing leadership address hard skills. Much of this fieldbook will maintain a more focused discussion on capacity.

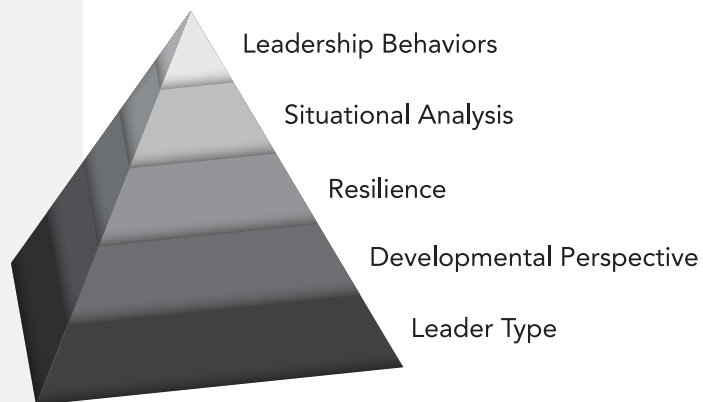
**Competency describes our ability to organize and apply facts, such as tactical skills and functional expertise. It is more objective.**

To summarize: innovative leadership requires a fundamental examination and balancing of your experience along four core aspects: personal, cultural, behavioral, and systematic, that can be gauged as both **capacity** (subjective ability) and **competency** (objective proficiency).

Innovative leadership grows natively from your own realistic self-exploration, allowing you to authentically engage leadership beyond tactical deliberation and systems.

## Domains of Innovative Leadership

*Figure 1-1 Five Domains of Innovative Leadership*



The first five chapters of this fieldbook explore the five domains of innovative leadership in more depth – reflected in Figure 1-1

What is truly innovative in this fieldbook is the overall comprehensiveness of the model. Theorists have looked at each of these domains separately over many years, and have suggested that mastering

one or two of them is typically sufficient for effective leaders. We submit 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 any other time in history. In the following chapters, we will define and describe each individual domain of innovative leadership and how they interact.

After fully defining innovative leadership, we move to Section II: “Building Innovative Leadership Capacity,” where we offer a six-step process in a workbook format. It includes tools and practices for each step in the process designed to support you in enhancing your practical effectiveness as an Innovative Leader. The steps in this process are:

- Create a compelling vision of your future
- Analyze your situation and strengths
- Plan your journey
- Build your team and communicate
- Take Action
- Embed innovation systematically

Each step of the process poses questions for reflection. It is the comprehensiveness of this reflection coupled with the exercises that will give you insight into yourself and your organization. This insight is required to change yourself and your

organization concurrently or to manage your internal change in the context of an organization that you cannot or do not want to change.

**Figure I-2 Leadership Development Process**



## ***Getting the Most from the Fieldbook***

Before you get started, take a moment to think about why you purchased this fieldbook. 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 5-7 events and/or choices that brought you to where you are professionally and personally?
- How did these events/choices contribute to choosing to buy and use this fieldbook?
- 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 fieldbook has to offer.

Take a moment to reflect on the guidelines below:

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

---

## ***How to Use the Fieldbook***

After this introduction, each subsequent chapter builds to form a complete approach to developing innovative leadership. The first section of the book provides the conceptual framework. The second section guides you through a series of exercises to help ground those ideas in a more practical fashion. 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 domain 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, yet others are designed to be conducted with input from your colleagues such as seeing their perception of your strengths and weaknesses.

### ***3. Link Together Your Experience***

As you sequentially build your understanding, you will begin noticing habits and conditioned patterns that can present you clear opportunities for growth. Though you may encounter personal resistance along the way, you will also discover new and exciting strengths. 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.

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.

# REFLECTIONS

**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?**



# SECTION I

## Five Domains of Innovative Leadership

Section 1 - “Five domains of Innovative Leadership” consists of the first five chapters of this Fieldbook and explores the five domains of innovative leadership in more depth. These domains (chapters) are reflected in the graphic above:

Each chapter offers a definition of the key domain; explains the role it plays in innovative leadership; gives an example of the models we use and provides an example or case study to demonstrate how we have applied these domains to improve leadership and organizational performance. These five key domains are interconnected and must be considered as a whole to build truly innovative leadership.

This model serves as the foundation that you will build on in Section II where you will take action to become an innovative leader.

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## Innovative Leadership Assessment



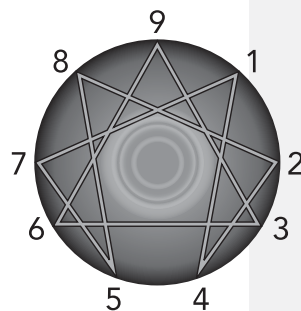
Following is a short self assessment to help you identify your own innovative leadership scores. It is organized by the five domains of innovative leadership and will give you a general sense of where you can focus your efforts to improve your innovative leadership capacity. As you progress through the book, you will find information on the full assessments if you are interested in 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.    | 1 2 3 4 5 |
| 2. I use the insight from this assessment to understand my type - specifically I understand my gifts and limitations and try to leverage my strengths and manage my limitations. | 1 2 3 4 5 |
| 3. I have a reflection practice where I understand, actively monitor and work with my “fixations”. (a fixation is a negative thought pattern)                                    | 1 2 3 4 5 |
| 4. I have a clear sense of who I am and what I want to contribute in the world.  | 1 2 3 4 5 |
| 5. I manage my emotional reactions to allow me to respond with socially appropriate behavior.  | 1 2 3 4 5 |
| 6. I am aware of what causes me stress and actively manage it.   | 1 2 3 4 5 |
| 7. I have positive coping strategies.  | 1 2 3 4 5 |
| 8. I actively seek ways to feel empowered even when the organization may not empower me in a given situation.  | 1 2 3 4 5 |

---

## Total Score

- If your overall score in this category is 24 or less, it's time to pay attention to your leadership type and self management.
- If your overall score 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 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 |

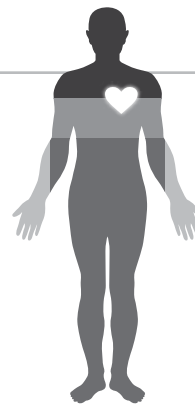
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## Total Score

- 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 this area.
- If your score is 36 or above, congratulations! Your developmental level appears to be aligned with innovate leadership yet this assessment is only a subset of a full assessment.

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## 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)*

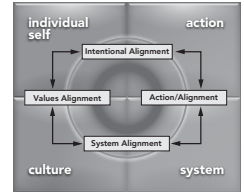
- |   |           |
|---|-----------|
| 1. I consistently take care of my physical needs such as getting enough sleep and exercise.         | 1 2 3 4 5 |
| 2. I have a sense of purpose and get to do activities that contribute to that purpose daily.        | 1 2 3 4 5 |
| 3. I have a high degree of self 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 additional perspectives. | 1 2 3 4 5 |

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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 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 .   | 1 2 3 4 5 |
| 2. My behavior reflects my goals and values consistently.   | 1 2 3 4 5 |
| 3. I feel safe pushing back when I am asked to do things that are not aligned with my values.   | 1 2 3 4 5 |
| 4. I am aware that my behavior and decisions as a leader have a significant impact on the organization's structure and culture.   | 1 2 3 4 5 |
| 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)   | 1 2 3 4 5 |
| 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.                                       | 1 2 3 4 5 |
| 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. | 1 2 3 4 5 |

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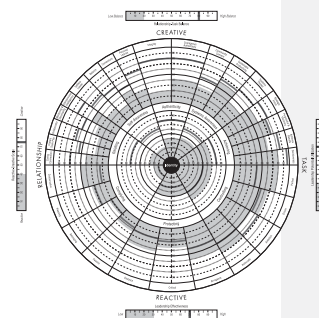
## Total Score

- If your overall score in this category is 21 or less, it's time to pay attention to my alignment with the organization and also the alignment within the organization that I am able to impact.
- 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) | 1 2 3 4 5 |
| 2. I focus on creating results in a way that encourages others to grow and develop while accomplishing their tasks.                                      | 1 2 3 4 5 |
| 3. I think about the impact of my actions on the overall organization rather than just getting the job done.   | 1 2 3 4 5 |
| 4. I see how my work contributes to the overall organizational success and deliberately try to improve myself and the organization.                      | 1 2 3 4 5 |
| 5. I take time to mentor others – even when I am busy.   | 1 2 3 4 5 |
| 6. I consider myself a personal learner because of the time I spend reading and trying new ideas and activities. I am curious.                           | 1 2 3 4 5 |
| 7. I have the courage to speak out in a professional manner when asked to do something I disagree with.  | 1 2 3 4 5 |
| 8. I accomplish results by working with and through others in a positive and constructive manner.  | 1 2 3 4 5 |

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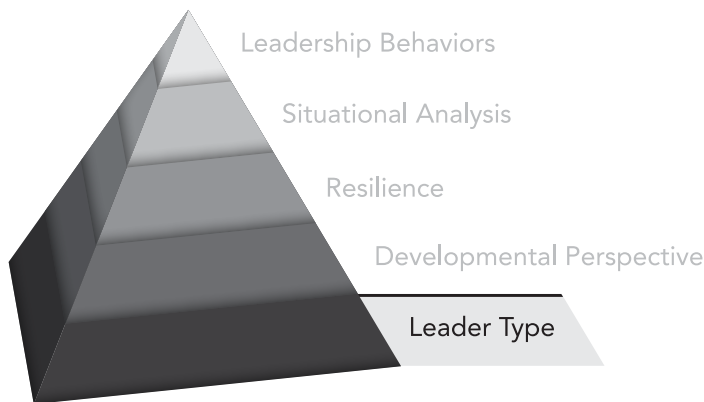
## Total Score

- 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 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

## Leader Type

*Figure 1-1 Five Domains of Innovative Leadership*



### ***The Importance of Leader Type***

Part of the challenge in building innovative leadership is learning to leverage the clarity of your introspection. Looking inside yourself, examining the make-up of your inner being, enables

you to function in a highly grounded way, rather than operating from the innate biases of more uninformed decision-making.

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

Your ability to use deep introspection relies on your development of a capacity for self-understanding and self-awareness. Both allow you profound openness of perspective as well as a greater understanding of others. These critical traits support leaders' abilities to self-regulate, communicate effectively with others, and encourage personal learning. You can employ a profound understanding of leader type for both yourself and others as a powerful tool to promote effective leadership.

It is important to keep in mind that this particular notion of type is native to your being and generally does not change significantly over the course of your life. This is an essential point: by ascertaining the distinct “shape” of your type, as well as that of others around you, you can begin to see situations without the bias of your own perceptions. You are then in a better position to leverage what you and others actually demonstrate, rather than acting from naive 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--from your personal, inner dynamics and immediate experience--can offer remarkable insight into areas of your character you tend to exaggerate or overemphasize.

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.

### ***The Enneagram Model and Leader Type***

There are several credible typing tools, some of which are used by a wide range of organizations. Prominent examples include: Myers Briggs Type Indicator, DISC, Big Five Personality Test, and the Enneagram. Each of these models has particular strengths in their presentations, as well as certain weaknesses. Their overall purpose is to help you make objective sense of the thought and behavior patterns of yourself and other people.



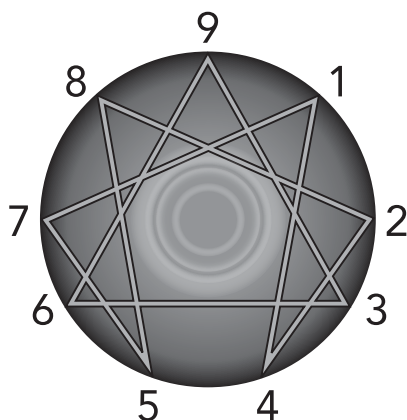
*Self-awareness, the practice of engaging in self-reflection and achieving clarity of insight, being conscious of one's own identity, and the extent to which perceptions about one's self are accurate and compatible with others' observations, play a pivotal role in leadership. Self-aware leaders self-regulate cognitions, emotions, and behavior more effectively depending on the situation, evaluate their impact on others, and possess higher levels of emotional intelligence.*

*Thus, they become more versatile in their leadership and may perform better. Consequently, successful leader development is foremost personal development. The Enneagram, one of the most comprehensive systems for understanding personality [leader type] and human development, offers considerable merit to support leaders to become more aware of themselves and others.*

*—Hilke Richmer, Doctoral Dissertation.*

As we observed through Hilke Richmer's research project, the Enneagram can be a very powerful typing model. Let's continue to explore the concept of type by also using the Enneagram as our primary tool to assess leader type.

**Figure 1-2 Enneagram**



The Enneagram can be a dynamic map of leader type that reveals how you organize experience and find meaning within it. The Enneagram describes nine distinct patterns of attitude and behavior that help to reveal an array of reasons supporting why you think and behave in the ways you do. Using the knowledge of what comprises the Enneagram's nine types can provide you a foundation for better understanding yourself, as well as maintaining healthy relationships through understanding the needs and perspectives of others.

The Enneagram symbol is a circle with nine points, representing the nine types native within all human experience, connected in a distinctive pattern of intersecting lines.



The Enneagram, like other tools, offers you a framework and language to discuss what you perceive about the intentions and see in the behaviors of yourself and others. Each Enneagram type is based on a pattern of what you pay attention to, or more specifically, your naturally occurring perceptions and preferences. By understanding the types of experiences you habitually reinforce and put energy into, you can observe yourself more accurately and develop more self-awareness. By enhancing self-awareness, you can exercise more choice about your own actions rather than engaging in patterns of thought, emotion, and behavior in an automatic, habitual, unconscious fashion. This insight alone will allow you to tailor personal and professional goals to achieve better results.

**TABLE 1-1 ENNEAGRAM TYPES****Type 1 — Reformer: The Rational, Idealistic Type**

I am a principled, idealistic type. I am conscientious and ethical with a strong sense of right and wrong behavior. I can be a teacher, crusader and advocate for change, always striving to improve things, but sometimes afraid of making mistakes. Well-organized, orderly and fastidious, I try to maintain high standards but can slip into being critical and perfectionistic. I typically have problems with resentment and impatience.

**At My Best:** I am wise, discerning, realistic and noble. I can be morally heroic.

**Type 2 — Helper: The Caring, Interpersonal Type**

I am a caring, interpersonal type. I am empathetic, sincere and warm-hearted. I am friendly, generous and self-sacrificing, but can also be sentimental, flattering and people pleasing. I am well-meaning and driven to be close to others, but can slip into doing things for others in order to be needed. I typically have problems with possessiveness and with acknowledging my own needs.

**At My Best:** I am unselfish and altruistic, and have unconditional love for others.

**Type 3 — Achiever: The Success-Oriented, Pragmatic Type**

I am an adaptable, success-oriented type. I am self-assured, attractive and charming. Ambitious, competent and energetic, I can also be status-conscious and highly driven for advancement. I am diplomatic and poised, but can also be overly concerned with my image and what others think of me. I typically have problems with over focus on work and competitiveness.

**At My Best:** I am self-accepting, authentic and a role model who inspires others.



#### **Type 4 — Individualist: The Sensitive, Withdrawn Type**

I am an introspective, romantic type. I am self-aware, sensitive and reserved. I am emotionally honest, creative and personal, but can also be moody and self-conscious. Withholding myself from others due to feeling vulnerable, I can also feel scornful and exempt from ordinary ways of living. I typically have problems with melancholy, self-indulgence and self-pity.

**At My Best:** I am inspired and highly creative and am able to renew myself and transform my experiences.

#### **Type 5 — Investigator: The Intense, Cerebral Type**

I am a perceptive, cerebral type. I am alert, insightful and curious. I am able to concentrate and focus on developing complex ideas and skills. Independent, innovative and inventive, I can also become preoccupied with my thoughts and imaginary constructs. I can be detached, yet high-strung and intense. I typically have problems with eccentricity, nihilism and isolation.

**At My Best:** I am a visionary pioneer, often ahead of my time, and able to see the world in an entirely new way.

#### **Type 6 — Loyalist: The Committed, Security-Oriented Type**

I am reliable, hardworking, responsible, security oriented and trustworthy. I am an excellent troubleshooter and can foresee problems and foster cooperation, but can also become defensive, evasive and anxious: running on stress while complaining about it. I can be cautious and indecisive, but also reactive, defiant and rebellious. I typically have problems with self-doubt and suspicion.

**At My Best:** I am internally stable and self-reliant, courageously championing myself and others.

#### **Type Seven — Enthusiast: The Busy, Fun-Loving Type**

I am a busy, outgoing, productive type. I am extroverted, optimistic, versatile and spontaneous. Playful, high-spirited and practical, I can also misapply many talents, becoming over-extended, scattered and undisciplined. I constantly seek new and exciting experiences, but can become distracted and exhausted by staying on the go. I typically have problems with impatience and impulsiveness.

**At My Best:** I focus my talents on worthwhile goals, becoming appreciative, joyous and satisfied.

**Type Eight — Challenger: The Powerful, Dominating Type**

I am a powerful, aggressive, self-confident, strong and assertive. Protective, resourceful, straight talking and decisive, I can also be egocentric and domineering. I feel I must control my environment, especially people, sometimes becoming confrontational and intimidating. I typically have problems with my temper and with allowing myself to be vulnerable.

**At My Best:** I am self-mastering and I use my strength to improve others' lives, becoming heroic, magnanimous and inspiring.

**Type Nine — Peacemaker: The Easygoing, Self-effacing Type**

I am accepting, trusting, easy going, and stable. I am usually grounded, supportive and often creative, but can also be too willing to go along with others to keep the peace. I want everything to go smoothly and be without conflict, but I can also tend to be complacent and emotionally distant, simplifying problems and ignoring anything upsetting. I typically have problems with inertia and stubbornness.

**At My Best:** I am indomitable and all-embracing and able to bring people together to heal conflicts.

***The Enneagram and Team Effectiveness***

In addition to building personal awareness, we also use the Enneagram to improve team effectiveness. Working within natural work groups, we ask individuals to respond to each of the following questions:

- What do others appreciate about your style?
- What is difficult about working with you?
- What do you need to remember when working with people who have other styles?

By using the Enneatype structure, participants are able to answer the questions. Using a model can help depersonalize the feedback and also help increase self and other awareness required to effectively relate to others. Using this structure opens a dialogue about how to work together effectively.

Exercises like the one above are intended to help you stay aware of both strengths and challenges within yourself and others. Moreover, they are designed to help you develop an increased sensitivity to people with differing styles without



being restricted by your own biases. As you enhance your ability to respectfully relate to people of different styles, you are also able to improve their impact on stakeholders both inside and outside the company, improving your organization's overall effectiveness.

### ***The Enneagram and Team Roles***

We also use a simplified grouping of the nine types to talk about how individuals function and influence performance within a team environment. The nine types are grouped into three team roles. We are assuming that all of these roles are important to high functioning teams. When assigning people to a team, it is important to explicitly consider type in addition to specific professional acumen and skills to ensure that the work of the team will be done effectively.

**TABLE 1-2 ENNEAGRAM TEAM ROLES**

**INITIATORS** like to get started and learn as they go along. They like action, diving in, getting engaged and involved (types eight, three and seven).

- Eight: "I'm here, I'll make things happen."
- Three: "Listen to what I have done/accomplished."
- Seven: "I'm here, things will get lively."

**COOPERATORS** want to take time to find out who the team is, understand the framework, what is behind it, and clarify the expectations, rules and guidelines in more detail. They have more questions about who is in charge of what and explore potential conflict with differing expectations (types one, two, and six).

- One: "I need to organize and fix this."
- Two: "How can I help?"
- Six: "I'm part of the high impact group."

**SOLOISTS** want to spend some time independently, thinking about a situation and feeling their way to an inner understanding of it. Others may perceive them as being withdrawn, not including others, or even being aloof (types four, five, and nine).

- Four: "I like to find an unconventional, creative solution."
- Five: "I like to observe and understand the patterns and theories."
- Nine: "I like to understand the perspectives of all of the stakeholders and build consensus."

## **Application**

Let's examine a very practical application within an organizational setting. Hilke Richmer used a typing model, specifically the Enneagram, as the foundation to create a leadership development program and wrote about the results for her PhD dissertation. According to Richmer:

*The purpose of the research was to assess the effects of the Personal Awareness and Effective Leadership Program in a medium-sized utility company in the Midwest United States. To provide middle managers with a unique development opportunity to enhance their awareness of self and others, the company had customized the Personal Awareness and Effective Leadership Program based on the Enneagram in 2009. The program was implemented in 2010.*

She elaborates:

*The company's organization development team conceived a program that focused on strengthening middle managers' interpersonal effectiveness and leadership versatility. Considering the extensive practical leadership experience of most middle managers and the challenge of actually changing leadership behavior, the team decided on a novel approach. Team members identified the Enneagram, one of the most comprehensive models of personality [leader type] and human development, as an appropriate instrument for the developmental program.*

*The Enneagram represented an accepted system to support middle managers to develop a better understanding of themselves and others. Therefore, teaching the Enneagram in leader development should foster middle managers' self-awareness and ultimately advance leadership behavior. This research evaluated the effects of the 2010 Personal Awareness and Effective Leadership Program for middle managers on enhancing self-awareness.*

*As a result of participating in the Personal Awareness and Effective Leadership Program, the company expected leaders to (a) understand the Enneagram and the nine [leader] personality types as identified by the Enneagram, be able to identify their own type, and realize their*



*developmental path, (b) apply Enneagram and Situational Leadership knowledge in their leadership to better recognize motivations and values in themselves and others, and (c) become better equipped to consciously self-regulate behavior in leadership situations and communicate more effectively.*

Her research concluded the following:

*Participants in both cohorts [training groups] found the Enneagram valuable to understand the rationale for their own behavior as well as others' actions and reactions. Participants acknowledged that the Enneagram fostered the understanding of why we behave as we do and also how to best read others. One participant stated that to be an effective leader in today's workforce, you must be able to understand why you are the way you are, so that you can improve.*

Richmer's experiment illustrates a crucial step toward building innovative leadership. To begin increasing your capacity for clear decision-making, you must first learn to impartially evaluate and examine the intentional and behavioral patterns in yourself as well as others. The inherent leverage within this simple yet powerful understanding cannot be overstated. It elicits a clarity that will help you make decisions without being governed by the bias of your own perceptions, even as you naturally experience them in any given occasion.

This objectivity is rooted in your ability see your conditioning without preference. It is this nonjudgmental perspective that allows the nuances of experience to persist in the interest of gaining real understanding. When you begin seeing in this way, you can navigate skillfully and execute without the baggage of erroneous expectations.

Applying a typing model can be an exceptionally valuable asset to team building and optimization. One of the critical challenges in working with teams is overcoming the conflicts of interest based on mischaracterization of team members. Such misconstrued perceptions can drain teams of precious energy as time is spent resolving conflict rather than attending to workloads and goals.

Here is an example of an exercise we ask team members to perform based on their type and team role:

- *What is your team composition? How many are Initiators? Cooperators? Soloists? Is there a prominent type within the team?*
- *Which tasks are best accomplished by each type?*
- *What do you need from group members to be most effective? Share your needs with the team.*
- *What ground rules will promote the most effective functioning of this team?*

It is important to note that while assessment can be very powerful, in some cases it is used ineffectively. Whatever typing tool is employed, it should always be used to support and enhance awareness and appreciation of yourself and others. It is unethical to use assessments to pigeon-hole, label, discriminate or disadvantage people. Typing assessments are offered to benefit the individual and the team with personal growth and enhanced team effectiveness. We recommend that you share your Enneagram type with team members and colleagues to improve team and group dynamics. The Enneagram is a very effective tool to improve self-awareness and social interactions.

In summary, this chapter provided a brief introduction and sample of how type models can be used. By harnessing the capacity to see your leader type and conditioning in an objective, nonjudgmental way, you are able to foster better insight in relation to your own experience without the strained effort that can stem from self-bias. You discovered the unique patterns that shape each type are genuine, natural and generally do not change much over time. In the most basic way, they simply reflect who you are most innately. The goal with leader type is to build self-awareness and leverage strengths, not try to change who you are. Understanding the natural conditioning that comes from leader type is a crucial stage in developing leadership effectiveness, and comprehensive innovation within the entire organization.



# REFLECTIONS

Using the Enneagram number system, where would you place your leader type?

///////

How have you used other typing tools in the past?

///////

Does this type information help increase your level of awareness regarding your habitual patterns, strengths and growth opportunities?

///////

Do you use this type-based information to guide how you interact with others?

///////

Would an increased use of type knowledge help improve your team effectiveness by promoting discussion among team members about preferred roles and communication styles?



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## Resources

This section includes additional recommendations to augment the fieldbook for those who want more in-depth information.

### ***Resources Chapter 2***

The theoretical research of Susann Cook-Greuter and Terri O'Fallon provide the most recent and complete references available in support of Developmental levels and their applications. Both can be found on their websites.

[www.cook-greuter.com](http://www.cook-greuter.com)  
[www.pacificintegral.com](http://www.pacificintegral.com)

### ***Resources Chapter 5***

For more information about The Leadership Circle Profile - see the study written by Bob Anderson and published by *The Leadership Circle, The Leadership Circle and Organizational Performance*, 2007.

[www.theleadershipcircle.com](http://www.theleadershipcircle.com)

### ***Resources Chapter 6***

Book: Parker Palmer, *Let Your Life Speak – Listen for the Voice of Vocation*. San Francisco: Jossey Bass, 2000.

### ***Resources Chapter 7***

- Mature Adult Profile Assessment (MAP)
- The Leadership Circle 360 Assessment
- Resilience Assessment
- Enneagram

[www.pacificintegral.com](http://www.pacificintegral.com)  
[www.theleadershipcircle.com](http://www.theleadershipcircle.com)  
[www.metcalfe-associates.com](http://www.metcalfe-associates.com)  
[www.enneagraminstitute.com](http://www.enneagraminstitute.com)

## Resources Chapter 8

- Book: Robert Fritz. “Tool: Structural Tension,” *Path of Least Resistance, Learning to Become the Creative Force in Your Own Life*. New York: Random House, 1989.
- Book: Bill Torbert and Associates. *Action Inquiry, The Secret of Timely and Transforming Leadership*. San Francisco: Jossey-Bass, 2004.
- Book: Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler. *Crucial Conversations: Tools for Talking when Stakes are High*. San Francisco: McGraw-Hill, 2002.
- Book: Art Kleiner, Peter Senge, Richard Ross, Bryan Smith, Charlotte Roberts. *Fifth Discipline Fieldbook, Strategies and Tools for Building a Learning Organization*. New York: Crown Business Books, 1994.
- Book: George Leonard and Michael Murphy. *The Life We Are Given, A Long Term Program for Realizing Potential of Body, Mind, Heart and Soul*. New York: Tarcher/Putnam, 1995.
- DVDs: Integral Life Practice Starter Kit. Integral Institute (3-2-1 shadow workshop and Big Mind).
- Online resource and tools: Heartmath meditation practices and emWave to monitor heart activity. [www.heartmath.org](http://www.heartmath.org).

## Resources Chapter 9

Book: Art Kleiner, Peter Senge, Richard Ross, Bryan Smith, Charlotte Roberts. “Conversational Recipes,” *Fifth Discipline Fieldbook, Strategies and Tools for Building a Learning Organization*. New York: Crown Business Books, 1994.

Book: Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler. *Crucial Conversations: Tools for Talking when Stakes are High*. San Francisco: McGraw-Hill, 2002.

## Resources Chapter 10

Book: Bill Torbert and Associates. *Action Inquiry, The Secret of Timely and Transforming Leadership*.^ San Francisco: Jossey-Bass, 2004.

Book: Robert Kegan and Lisa Laskow Lahey. *How the Way We Talk can Change the Way We Work*. Boston: Harvard Business School Publishing, 2009.

DVD: Shadow Module 3-2-1 Process with Diane Hamilton; Integral Life Practice Series produced by Integral Institute.

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Terri O'Fallon. "The Collapse of the Wilber-Combs Matrix: The Interpenetration of the State and Structure Stages." Presented July, 2010 at the Integral Theory Conference (1st place winner)

Terri O'Fallon. "Integral Leadership Development: Overview of our Leadership Development Approach." [www.pacificintegral.com](http://www.pacificintegral.com), 2011.

Hilke R. Richmer. An Analysis of the Effects Of Enneagram-Based Leader Development On Self-Awareness: A Case Study At A Midwest Utility Company Doctoral Dissertation, Spalding University. 2011.

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## About the Authors

### ***Maureen Metcalf***

Maureen Metcalf 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 on 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 the 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 Palmer 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*, 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.

# *Praise for the 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 Fieldbook 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 Fieldbook* 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 Fieldbook* 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 Fieldbook* 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 Fieldbook* is a "must have" for your personal development and your clients. Beautifully written, academically brilliant, and masterfully designed; The *Innovative Leadership Fieldbook* 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 Fieldbook* 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 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**



The *Innovative Leadership Fieldbook* tackles the complex topic of leadership and makes it real, practical, and powerful for leaders in all walks of life. I have used elements of this approach in an organizational transformation and found it delivered significant positive results. This book explains the key elements of leadership required for complex change and how to build them in yourself and your team.

**Rob Richardson, CIO Large Global Manufacturing Firm**

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