



The Spectrum Stage SHIFT

THE 10 INSIGHTS INTO
VERTICAL EVOLUTION IN 2020

BY DR ANTOINETTE BRAKS

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Steve Johnson @unsplash



Vertical development and enterprise evolution ~ VERTICAL EVOLUTION ~ are growing in popularity. The timing is perfect as we pivot into the challenge and opportunity to recreate our world. The current chaos we find ourselves in demands the creation of a new order – and from a new altitude at a later stage of vertical development.

The prevailing capitalist economic model focused on profits for shareholders has led to economic gains for those with capital and increasing social issues for those without. The planet is reeling from exploitation, more and more people are struggling as a result of not having the means to thrive even when in full-time employment, and the widening rifts amongst those who have been privileged and those who have not, are being exposed.

Never has vertical evolution been more important and urgent. The third person perspective we were mostly occupied with is focused on the external material world, on more revenues, more profits and more things, in the delusion that more success means greater happiness. Whereas the emerging fourth person perspective tunes into inner personal wellbeing and universal principles such as fairness, sustainability and community.

The pandemic seems to mark the point of no return. Life can't go back to 'business as usual' and many conventional business models have been irrevocably damaged. There is no choice left but to change the game entirely. This has already begun to happen with the new work-from-home norm for digital work, furlough payments for those who can't work, essential hospital care and newly set geographic borders.

It leads to the potential of a universal basic income, universal healthcare, local production of organic produce, and a return to the value of building a local inclusive community where people, young, old and in-between, feel loved and valued. It demands the need to create a local/global eco-centric infrastructure that supports our wellbeing.

As Einstein advocated, we can't solve problems at the level they were created. The complex systemic problems that have arisen from the way our economy and society has been structured must give way to a new socio-economic architecture. To be able to clearly see the interconnected complexity, we must develop a new later stage perspective and co-creatively lean into emergence to uncover new solutions, innovative business models and new mutually empowering relationships amongst all stakeholders – the government, commercial interests, the environment, local community and people in all walks of life.

This paper is the first part of a 3-part series explaining what I have learned as a researcher and practitioner in holistic vertical development and strategic enterprise evolution, and the interplay between them, over the last 10 years. In this paper I will outline ten insights to illuminate the Spectrum Stage Shift.

Dr Antoinette Braks

11.11.2020



WHAT IS VERTICAL EVOLUTION?

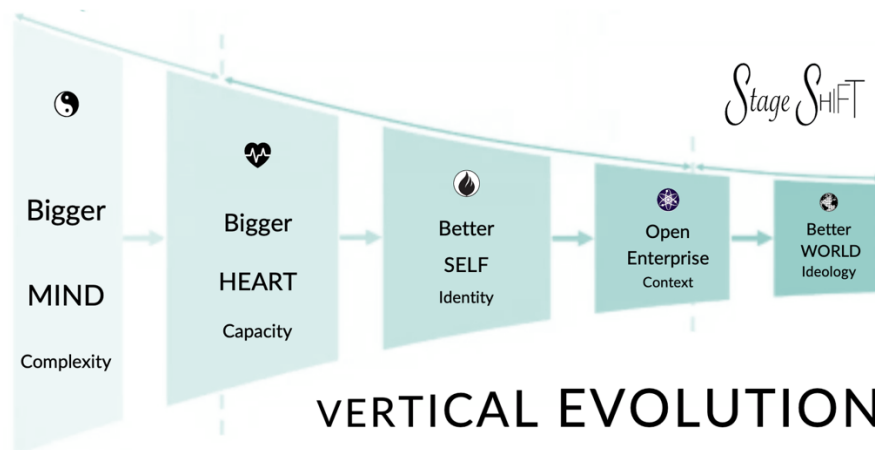
Vertical Evolution is a blend of Vertical Leadership Development and Enterprise Evolution.

Vertical Leadership Development

Vertical Leadership Development is based on our capacity as human beings to continue to grow holistically as adults. We do this in relation to developing a bigger mind (Kegan), a bigger heart (Cook-Greuter), and a better self (Kohlberg) in order to become self-actualising (Maslow).

A bigger mind enables us to engage the power of emergence within complex adaptive systems and unpredictable volatility. This is essential to transcend the massive disruption we face today. A bigger heart enables us to demonstrate compassion and engage the whole community. This is essential to embrace the widening polarisation we must face today.

With a bigger heart and mind, a better self takes inspired purposeful action on behalf of the whole community, the whole industry sector or a whole country or region over longer term time horizons. We increasingly demonstrate integrity of character that enables everyone and all of life to thrive and flourish as we forge a better world.



Vertical Enterprise Evolution

We grow in character up to the level of other adults around us as we learn from them as role models within the context we are operating in e.g. our family's norms or the organisation's expectations. It is like being in a container that enables us to grow to the limits of its boundaries and then puts a lid on our organic vertical growth as it would around a plant.

Organisations are containers that shape, liberate and/or contain our vertical growth. If we are at an earlier stage than the prevailing level of the organisation, we can grow to that level but will then feel disengaged and disempowered if we grow beyond that level.

More open enterprises at later stages of vertical evolution (Laloux), liberate our power to flow with emergence and flourish through purposeful collaboration. I will return to Vertical Enterprise Evolution later in this paper. Let's explore Vertical Leadership Development first.



WHAT ARE THE STAGES OF DEVELOPMENT?

Vertical Leadership Development is made up of a defined series of steps in development that follow a defined invariable sequence. Many years ago when coaching, I perceived these as: 'from work to play, grow to flow, to calm'. Later, as I 'grew up', I extended them to: 'from calm to care and free to love with joy'.

| | | | | | | | | | |
|------------------------|------------------------|-----------------------|------------------------|-----------------------|------------------------|-----------------------|------------------------|-----------------------|--------------|
| Stage SHIFT | work | play | grow | flow | calm | care | free | love | joy |
| | | | | | | | | | |
| OPPORTUNIST | CONFORMIST | SPECIALIST | ACHIEVIST | CATALYST | SYNERGIST | CONSTRUCT | ALCHEMIST | IRONIST | HOLIST |
| Mature 1 st | Mature 2 nd | Early 3 rd | Mature 3 rd | Early 4 th | Mature 4 th | Early 5 th | Mature 5 th | Early 6 th | Cook-Greuter |

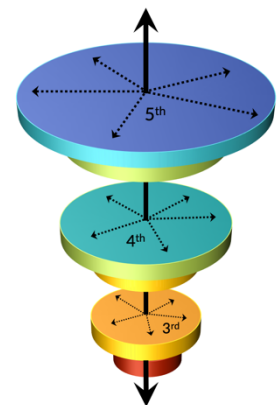
Stage Development is a Two-Step Process

A range of terms is used to describe these defined stages of development by various thought leaders. I have selected the above series based on their 'ist'-ness and clear application in the corporate world. Each new stage builds on the strengths of earlier stages, reveals new gaps in understanding and exposes weaknesses in earlier character foundations.

One of the key contributions that Susanne Cook-Greuter made to vertical leadership development, was the identification of progressive person perspectives in association with the stages of development. She observed that two sequential steps forge each new person perspective.

The first is a step of individuation, an adventure into a new world where a person gradually becomes aware of and familiar with increasing subtlety. The second is a step of integration, the capacity to be actively involved in creating this new world. Together they forge a transformation of identity in vertical development.

The progressive person perspectives can be best understood initially in terms of sentence grammar. For instance, our identity at the 1st person perspective is aligned with 'I' or 'me'; at the 2nd person perspective it shifts to 'you' i.e. complying with others such as parents, teachers and managers; the 3rd person identity focuses on 'it' i.e. products, processes and profits; our identity at the 4th person perspective is the 1st person plural: 'we'; the 5th shifts to 'all of you'; and the 6th to 'all that is'.



3 Sequential Person Perspectives
Adapted from Cook-Greuter, 1995


INSIGHT #1

The stages of vertical development form two-step sequences that transform one's identity to the next person perspective. The first step of individuation builds deeper and richer conscious awareness, and the second stage of integration leads to proactive creativity and mastery.



The Stages of Vertical Leadership Development

Here is a brief summary of the stages. On the left-hand side, you can see the connection between the stages and the conventional, postconventional and transpersonal phases of development (Kohlberg). On the right-hand side, they are associated with the three Tiers of vertical leadership development: Concrete, Subtle and MetAware, the types of objects found in each Tier (O'Fallon).

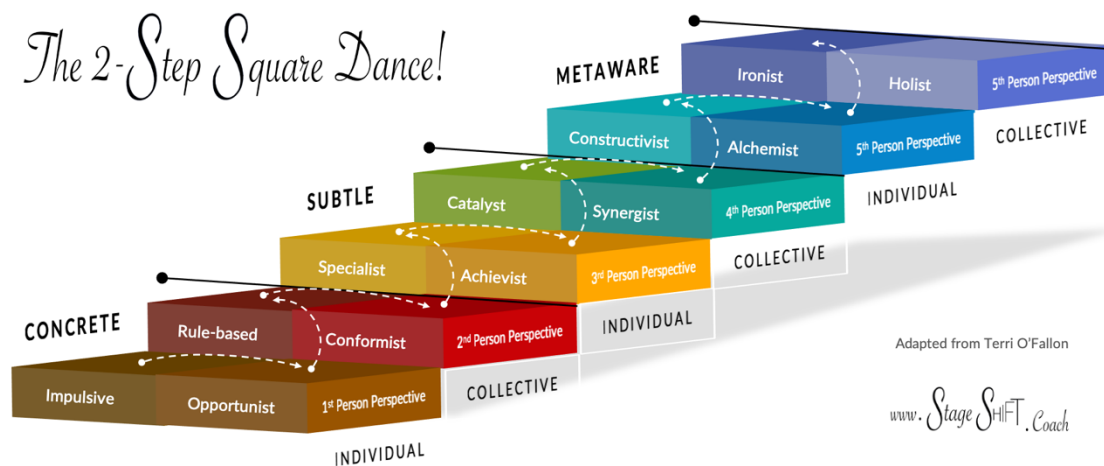
| | | | | |
|-------------------|--|---|--|-----------|
| TRANSPERSONAL | <p><i>joy</i></p>  | <p>Holist 'inspires all'</p> | <p>Infinity and eternity Emptiness and fullness Lightness, timeless, boundless Oneness, formless, emptiness Fullness of love experience Luminous self as spirit</p> | MET AWARE |
| | <p>Ironist 'generates love'</p> | <p>Fullness of compassion Perceives passing of ages Timely world-centric action Sees impact of butterfly wings Cosmic perspective Surrenders the self</p> |  <p><i>love</i></p> | |
| | <p><i>free</i></p>  | <p>Alchemist 'evolves society'</p> | <p>Life is a theatre Empty open mind Integrates material and spiritual Sees repeating eternal patterns Order and mess are okay Social transformation</p> | |
| POST-CONVENTIONAL | <p>Constructivist 'reframes reality'</p> | <p>Disrupts the status quo Takes reverent care of life Constructs reality with thought Sees own projections instantly Perceives eras of civilisation Collective shadow arises</p> |  <p><i>care</i></p> | SUBTLE |
| | <p><i>calm</i></p>  | <p>Synergist 'leads evolution'</p> | <p>Sustainable change Mutual collaboration Orchestrated and systemic Vigilant and vulnerable Purposeful fulfilment Sets trust as default</p> | |
| | <p>Catalyst 'is authentic'</p> | <p>Life is a journey Reflective and insightful Collaborative change agent Interweaves across stakeholders Generates unique perspectives Follows intuition over logic</p> |  <p><i>flow</i></p> | |
| CONVENTIONAL | <p><i>grow</i></p>  | <p>Achievist 'gets results'</p> | <p>Sets and juggles priorities Positive, pragmatic planner Life is about striving and winning Wants "More" and always "Busy" Proactively achieves team goals Feedback fosters better results</p> | CONCRETE |
| | <p>Specialist 'develops skills'</p> | <p>Life is a major effort Logic and expertise prevail Quality continuous improvement Highly critical and perfectionist Always "Not good enough" Takes feedback personally</p> |  <p><i>play</i></p> | |
| | <p><i>work</i></p>  | <p>Conformist 'by the rules'</p> | <p>Life is a struggle Right and wrong Enjoys belonging Follows directives "Us" and "them" Takes zero-risk</p> | |
| | <p>Opportunist 'on the take'</p> | <p>Sees new opportunities Creates new ideas Acts in self-interest Closed to feedback Life is threatening Attacks to defend</p> |  | |



Stage Development is also a Square Dance

Terri O'Fallon's research has identified an even more rigorous scientific architecture underpinning the stages of vertical development. Her research is endorsed by the outcomes of my more pragmatic research study of the development of strategic leaders to mature Synergist in large earlier stage organisations.

O'Fallon identified that the two-step sequences outlined above, alternate between an Individual orientation and a Collective orientation. For instance, the 1st person perspective concerned with 'me' is Individual; the 2nd person focused on 'you' conforms with the Collective; the 3rd person is focused on how I can obtain more of 'it' to be more successful - Individual; and the 4th person perspective turns to 'we', the wellbeing of all of us, the Collective, not just some of us. These terms derive from the Integral AQAL Model (Wilber) which I refer to later in this paper.



While this might present as pure theory, it's actually critical to the process of vertical development. Knowing that each time we evolve to a new perspective we need to reprioritise our primary and secondary orientations is particularly relevant today.

We are currently being invited to master the emerging 4th person collective perspective having inherited the issues from an individualist and frequently exploitative 3rd person perspective. It is valuable to realise that our new priority is to reinvent and transform the polarising 2nd person collective of 'us and them' to the collective 4th person public interest inclusive of everyone.

INSIGHT #2

The two-step sequences of vertical development alternate between a primary Individual orientation and a primary Collective orientation. At this time, it is our challenge to uplift, reinvent and transform our conventional polarising Collective from a 2nd to a 4th person perspective.

NB The arrows indicating movement in the diagram above are shown to illustrate the journey through the stages. In actual fact it is a little more complex integrating upward, downward, forward, backward, outward and inward movements through the course of our vertical development.



WHAT IS A SPECTRUM STAGE SHIFT?

While vertical development has focused on being 'at a stage' in the past, this is not really the case. We generally range across an average of four stages of vertical development as we evolve - two have an Individual orientation and two are in the Collective. The predominant shift in the world today is from the four stages in the 2nd and 3rd person perspectives to the 3rd and 4th person perspectives.

Our Centre of Gravity

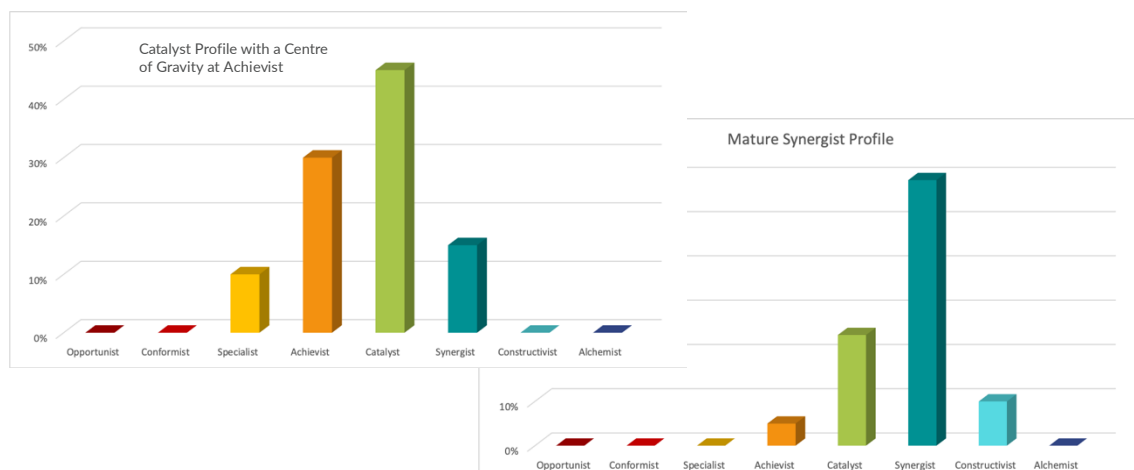
Our main operating system, our 'go to', is called our Centre of Gravity, a term coined by Bill Torbert. Based on my research, leadership and coaching experience, our Centre of Gravity must therefore be in a stage of integration. Only then are we familiar with what we see, and able to actively operate on the system, not just navigate it. Our Centre of Gravity is thus always in one of Opportunist, Conformist, Achievist, Synergist or Alchemist.

Our Centre of Gravity is one we are confident in. We know we can use this inner operating system to be effective. We will always turn to it under stress even if this means consciously regressing from our growth zone. For instance, when we are pressed to deliver results this quarter, we might find ourselves defaulting back to an automated directive leadership style at Achievist rather than continuing a more conscious participative leadership style at Catalyst.

We also have a secondary stage, a stage we stretch to when we have encouraging support such as a later stage leader or executive coach e.g. from Achievist to Catalyst, or one we turn back to under further stress e.g. from Achievist to Specialist. We generally also hold a leading edge into our new frontier if we have any awareness of it, and a trailing edge into old patterns of behaving.

INSIGHT #3

We generally range across an average of four neighbouring stages of vertical development, two Individual and two Collective. Our main operating system, called our Centre of Gravity, is our latest integrated stage where we feel confident in our effectiveness as a leader.



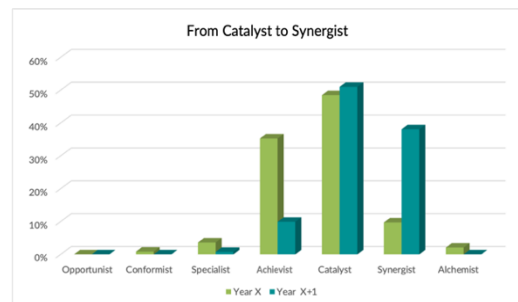
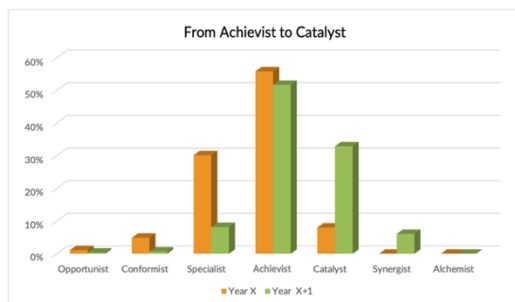


Vertical Stage Assessments

Most vertical leadership assessments are variations of the Washington University Sentence Completion Test originated by Jane Loevinger. Highly qualified certified scorers assess the language and sentence construction amongst many other indicators, to calibrate some 36 sentence prompts completed in an assessment. The final rating is a weighted average of all of the sentence completions, the later the stage, the greater the weighting. As a result, a person can be assessed at a stage that is not yet dominant.

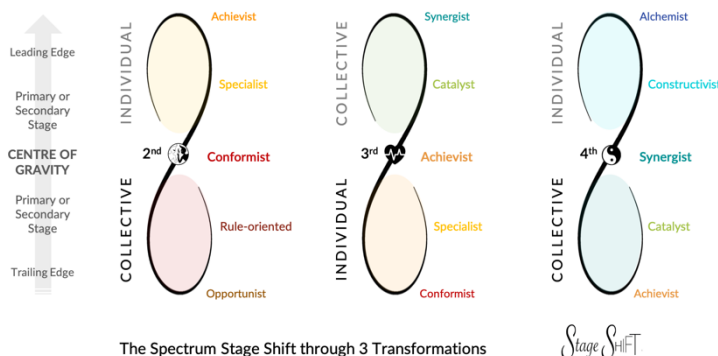
In my experience, leaders assessed at Synergist were not always operating from Synergist. Coachees were still inquiring into perplexing situations during coaching conversations rather than taking authentic, intuitive and transforming collaborative action. I surmised that while their inner awareness was becoming integrated at Synergist, there was still significant inner work to be done and outer knowhow to experiment with, to fully integrate as a *mature* Synergist.

This led me to a new understanding of vertical leadership development. I call it the **Spectrum Stage Shift**. Our spectrum of stages is anchored in our Centre of Gravity. Until the next stage of integration is fully matured, we continue to operate largely from the earlier integrated stage. My research led me to understand that a new Centre of Gravity at Synergist could not fully consolidate until its mastery had surpassed the effectiveness of the previous Centre of Gravity at Achievist. Only then did the Achievist proportion of the profile drop to a trailing edge.



INSIGHT #4

Being assessed at Synergist is not the same as operating effectively at Synergist. Full maturity at Synergist demands inner and outer mastery of personal and enterprise transformation to let go of the Achievist.



To illustrate the **Spectrum Stage Shift**, I developed the concept of a Figure-8 operating system around our Centre of Gravity, leaning into later stages and also regressing to earlier stages as the best means to accomplish initiatives or respond effectively to situations.



Our Self-Expression and Life Experience

Two other dimensions that fully explain the nature of a Spectrum Stage Shift relate to our self-expression and life experience. We make Cook-Greuter's correlation of our human faculties with the stages of development explicit. At each stage, we incorporate more of our human potential.

| | | | | | | | | | |
|-------------------|-----------------|-----------------------|------------------------|-----------------------|------------------------|-----------------------|------------------------|-----------------------|------------------------|
| Stage SHIFT | <i>work</i> | <i>play</i> | <i>grow</i> | <i>flow</i> | <i>calm</i> | <i>care</i> | <i>free</i> | <i>love</i> | <i>joy</i> |
| Impulse | Ego | Will | Heart | Intuition | Mind | Guidance | Spirit | Light | Soul |
| OPPORTUNIST | CONFORMIST | SPECIALIST | ACHIEVIST | CATALYST | SYNERGIST | CONSTRUCT | ALCHEMIST | IRONIST | HOLIST |
| 1 st | 2 nd | Early 3 rd | Mature 3 rd | Early 4 th | Mature 4 th | Early 5 th | Mature 5 th | Early 6 th | Mature 6 th |
| Safety & Security | Belonging | Self Esteem | | Self-Actualization | | | Self-Transcendence | | |

We are ruled by our impulses at Opportunist and our ego forms at Conformist. We go to *work*. We exercise our Will to make our own way in the world at Specialist and begin to *play*. As we open up our Heart to our families and colleagues at Achievist, we *grow* and develop self-esteem (Maslow). If our hearts open further to our inner world, we listen to our Intuition at Catalyst and move into *flow*. As we heal our shadow with our heart, the cacophony of voices in our mind dissolves, and we emerge with a *calm* and clear Mind at Synergist. We are self-actualising (Maslow).

With a warm heart and clear mind, we become open to spiritual Guidance at Constructivist and act with reverent *care* for all. As we become duty, doubt, and debt-free, we can take inspired action anchored in Spirit at Alchemist. When we see the Light and *love* in all beings, we evolve to Ironist and ultimate enjoy joyful self-transcendence at Holist.

As you may imagine, our Life Experience shifts accordingly as we evolve. At earlier stages we struggle (Reactive Patterns) and strive (Creative Stretch). As we master our human journey, we thrive (Emergent Future) and flourish (Ease and Grace). These are the energy fields of our life experience through the stages. They are named based on the work of renown thought leaders in each field – Horney, Senge, Scharmer, Beckwith and Campbell.

The Spectrum Stage SHIFT

VERTICAL EVOLUTION
INTEGRATED IDENTITY



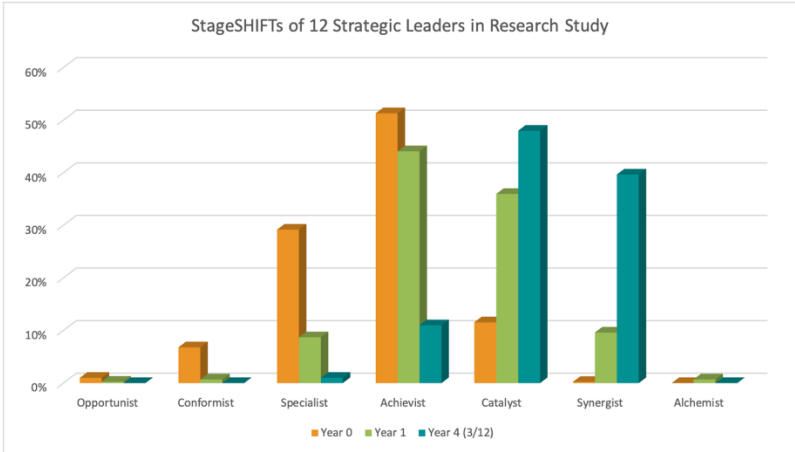


INSIGHT #5

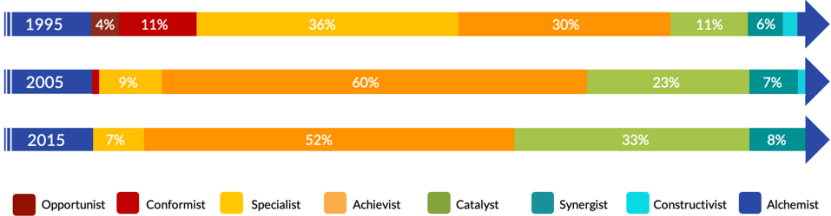
As we evolve through the stages and shift our Centre of Gravity to the next integrated stage, we harness more of our human faculties to realise more of our potential. During this journey the quality of our life experience shifts from struggling and striving to thriving and flourishing.

HOW DO YOU DEVELOP VERTICALLY?

It was thought to take five-six years to develop to later stages such as Synergist (Torbert). However, people attending the 20-day intensive retreat-like integral leadership programs shift one or two stages over 1-2 years (Brown). Further, in my research study, all the participating strategic leaders shifted a full stage in 1 year, and 20% shifted two stages from Achievist to Synergist in the 1 year.



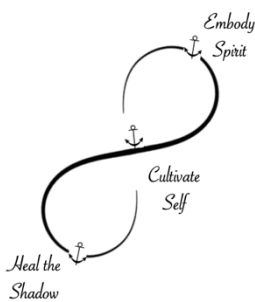
These stage shifts were accomplished after an average of just eight 90-minute coaching sessions. This begs the question, if later stage vertical development is so accessible, why is the development of Synergists stalled? As a proportion of the executive population, the number of Synergists has barely increased at the rate of just 1% per decade over 20 years (PwC Report).



The qualitative research analysis of >100 hours of coaching conversations (>100,000 words) endeavoured to discover the drivers of this swift vertical development to later stages, and the dynamics of vertical development in the workplace. A third line of inquiry explored what was distinctive about the coaching approach in contrast to most advanced strategic leadership development programs.



Vertical Development of the Holistic Self



The first step in vertical development is to be explicit.

For strategic leaders, this is to actively undertake the journey to shift one's Centre of Gravity from Achievist to Synergist. In our mind's eye, we can shift our anchoring point to Synergist, and then employ these three strategies:

1. Set the intention to embody our aspirational self
2. Cultivate the new aspirational self at Synergist
3. Heal the shadow that arises on the journey.

The incentive is the adventure of the hero's journey, and the oasis of calm that emerges in the mind and accordingly, harmony in our life experience. We shift from striving and thriving at Achievist to thriving and flourishing at Synergist. Thriving is so much better than struggling and striving, and to flourish is to bloom and create a harvest of abundance.

I think we give insufficient attention to the nature of our human life experience and our personal capacity to live a fuller, more fulfilling and purposeful life by actively developing our consciousness to later stages of vertical development.

Life is a MOVIE A Projection of the Conscious Mind *Live the Dream*
Life is a MIRROR . . . A Reflection of the Subconscious Mind . . . *Love the Drama*
Life is a-MAZING A Connection with the Cosmic Mind *Learn to Dance*
Life is a MYSTERY . . . An Inception of the Universal Mind . . . *Lead the Dharma*

Antoinette J Braks

Perhaps what is also not well understood is that our life experience is the outcome of our self-expression at the level of identity. By uplifting our identity, we uplift our life and that of all others around us. While a Catalyst learns to surf the waves of change, the Synergist calms the ocean by creating new order. If we are calm within, we can contemplate the chaos without fear and synergise with others to access, advocate and implement emergent innovative intersystemic solutions.

This is why we need more Synergists. They can rise above the disruption, embrace the polarisation and lead transformation because they have done this work within themselves. By undertaking deep shadow work, we heal within and eliminate emotional triggers.

INSIGHT #6

If strategic leaders explicitly attend to vertical leadership development as a Spectrum Stage Shift from Achievist to Synergist, they will embark on the Hero's Journey and, with the appropriate coaching support, can forge their new integrated identity at Synergist in one-two years.



Vertical Development of the Strategic Self

Given the organisational context, it is also essential to develop later stage strategic leadership capacity. For the Synergist, this is to lead enterprise evolution. It has become clear to me that without leading the vertical transformation of the leader's context e.g. their division, organisation or community of stakeholders or clients, the Synergist leadership capacity cannot mature. Only by leading transformation is it mastered.

I offer you a transport system analogy to understand the stages of enterprise evolution.



When a business first forms, it navigates its own way with close allies on board, like a ship at sea. As it grows in size, it must evolve to a hierarchy with set processes, allocated responsibilities and a focus on deliverables. Like the rail system, the carriages follow in sequence RED, they run on specifically laid tracks to a set timetable with defined destinations.

As the organisation shifts to innovation to meet customer needs, it evolves into an empowered matrix like the road transport system. People can now travel alone or with others, along different highways and byways, to realise outcomes of their own choosing. It's messy and it's engaging. Decision-making power is distributed through the enterprise.

The next evolution is to espouse and embody shared direction by way of a visionary purpose that is out of sight but imaginable, shared values where everyone is respected, and a belief in the power of emergence to present solutions to all challenges encountered. This is like taking a flight with all resources onboard to a far-off and important destination.

The next evolution consists of creating a spaceship hub to create and maintain peace and wellbeing. Everyone flies missions to fulfil this purpose using their own guidance system.

INSIGHT #7

To master the leadership capacity of a Synergist, the strategic leader must uplift the organisation to accommodate multiple operating levels.

The role of the Synergist is to uplift the whole organisation. I suggest that the strategic level of the organisation aligns with the aviation model, externally facing business units with the road transport system, and internal quality processes with the rail transport system. Strategic leaders who lift their divisions in this way, integrate their new identity at Synergist and free their time and attention to become more inspiring visionary leaders.



The Drivers of Vertical Development to Synergist

The qualitative analysis identified eight key drivers of vertical development to Synergist.

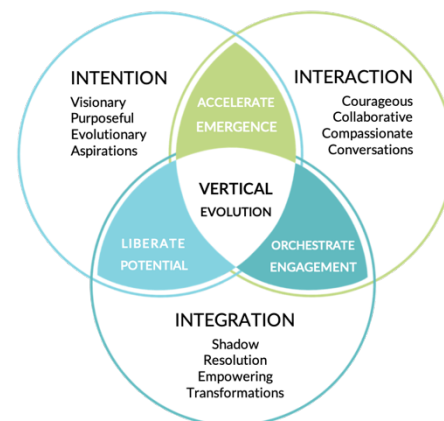
| SELF | INTENTION | INTERACTION | ALL |
|-------------|---|---|-----------|
| COLLECTIVE | 1. Shared Purposeful Strategic Direction | 2. Distribute Time to Orchestrate Flow | STRATEGIC |
| | 7. A Unique Signature Living Presentation | 8. Collaborate Widely to Generate Synergy | |
| INDIVIDUAL | 3. Set Evolutionary Personal Aspirations | 4. Positive Kindness and Open Mindfulness | HOLISTIC |
| | 5. Release Shadow Psychodynamics | 6. Hold Courageous Caring Conversations | |
| INTEGRATION | | | |

They were common to all the coaching programs integrating strategic leadership with the organisation, and holistic leadership with a transformed identity.

The three underlying principles were distilled as INTENTION, INTERACTION and INTEGRATION. Intention accelerated emergence; interaction was heightened by orchestrating engagement, and the integration of strategic holistic leadership liberated potential.

It seems to me that most offsite leadership development programs are too isolated from the workplace for the immediate application of their learning. Moreover, I wonder if strategic leadership programs incorporate proven practices in vertical evolution for the leader and their part of the enterprise to liberate the latent potential of their people?

My research suggests that it is a myth that strategic leaders are constrained by their organisational context. By overcoming the very challenge of uplifting their part of the organisation, a leader manifests the leadership capacity of a Synergist.



INSIGHT #8

The 8 key drivers of strategic holistic leadership development to Synergist are underpinned by setting aspirational intent, learning how to interact with others with courage and care, and integrating shadow resolution with enterprise evolution to liberate everyone's potential.

The second white paper in this series will explore the dynamics of Synergist leadership development in the workplace, and the implications for enterprise evolution. The key is that the appropriate stage of leadership capacity is present at the relevant role level i.e. strategic leaders at Synergist, change leaders at Catalyst and business leaders at Achievist.



WHAT DISTINGUISHED THE COACHING?

The Distinctive Coaching Approach

In addition to the drivers and dynamics of vertical evolution to Synergist for the strategic leader, here are the factors concerned with the distinctive coaching approach.

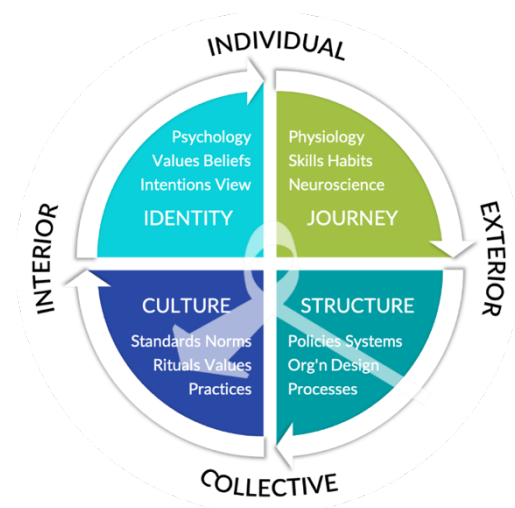
- The later stage of the executive coach at mature Synergist
- Their confidence in their previous experience of successfully designing and leading strategic culture transformations of 1,000-person organisations
- The holistic approach they had taken to forge their own character and heal their own shadow over many years
- Their own experience of the impact of shadow healing and mindfulness on the development of a warm heart, calm mind and more uplifting life experience
- Their in-depth expertise and continuing study of vertical leadership development and enterprise evolution with leading global vertical thought leaders
- Their personal purpose to inspire and enable strategic leaders to evolve to Synergist so that they could transform and uplift their organisations in order to contribute to generating a more sustainable, healthy, equitable and joyful world.

Further, vertical development was explicitly agreed and coachees felt inspired to evolve.

Contrast this with an executive coach who has not yet integrated their identity at Synergist or beyond, who has not yet led their own personal or an organisational transformation and is not versed in vertical development or enterprise evolution.

Consider also the coachee. Senior executives including strategic leaders prefer to take zero risk. Unless their executive coach can offer proven processes and frameworks, it is too risky to experiment with transforming the structural context of their part of the organisation. It is not their role and it would be career suicide to try and fail.

Coaching is designed to help them navigate a systemic context, however disempowering and dysfunctional it is, not to circumvent it, transcend it and build a new layer of strategic scaffolding to liberate the people within it. Yet, this is what ignites and expedites the development to mature Synergist.



INSIGHT #9

The demand on executive coaches to facilitate the vertical evolution of strategic leaders is significant. To gain the confidence of our coachees, we need to be purposeful, explicit, have evolved to Synergist, and be familiar with vertical leadership development and enterprise evolution.



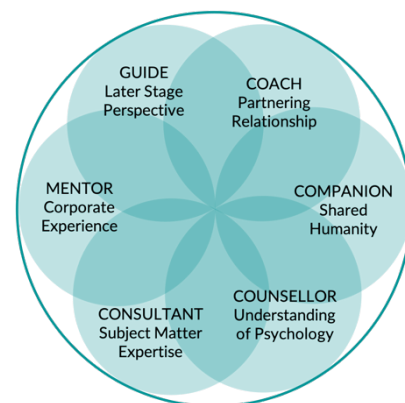
The Next Evolution of Executive Coaching

The next evolution of coaching (Stelter), transformative coaching, is at hand. It is essential to enable the transformation to mature Synergist. Developmental coaching, by its very non-intrusive nature, can only take a person as far as Catalyst.

| | | | | |
|--|--------------------------------------|--|--------------------------------------|--|
| COACHING TYPOLOGY | SKILLS-BASED COACHING | PERFORMANCE COACHING | DEVELOPMENTAL COACHING | TRANSFORMATIVE COACHING |
| Coach as ... | INSTRUCTOR | MOTIVATOR | FACILITATOR | COLLABORATOR |
| Coaching Paradigm | Informed, Practice makes Perfect! | Positive Psychology Process Centric | Humanistic Inquiry Person Centric | Holistic Emergence Systemic Synergy |
| Primary Success Factor | Ability to Teach & Learn | Clarity of Agreed Goals | The Coaching Relationship | Mutual Meaning-Making |
| Coaching Relationship | Transactional Transfer | Mutual Accountability | Professional Trust | Dialogic Partnership |
| Coaching Models & Techniques | Rehearsal & Feedback | Cognitive Behavioural | Narrative Story Complex Systems | Psychodynamics Collective Identity |
| Typical Duration of Session/Program | 30-60 Mins 3-12 Weeks | 30-60 Minutes 3-6 Months | 60-90 Minutes 6-12 Months | 90-120 Minutes 12-24 Months |
| Leadership Outcomes | Thought Leadership Best Practice | Transformational Agile Leadership | Authentic Adaptive Leadership | Quantum Eco- centric Leadership |
| Stage Outcome | SPECIALIST | ACHIEVER | CATALYST | STRATEGIST |

While developmental coaching focuses on open, clean questions, transformative coaching invites:

1. A dialogical partnership that leverages the capacity of the coach to share insights and revelations not yet accessible by the coachee
2. A focus on meaning-making at the level of identity to facilitate a deeper understanding of intuitive guidance, psychodynamics and shadow
3. The opportunity to take on a multifaceted role as a coach to expand the scope of the relationship.



INSIGHT #10

To facilitate vertical evolution for strategic leaders to Synergist, it is essential to adopt the next evolution of coaching, transformative coaching, to enable a deeper dialogical and broader partnership to form.



Application for Practitioners

There is a common trap for the unwary in the evolution from Achievist to Catalyst that is currently the focus of many Authentic Leadership Programs.

The shift to Catalyst does feel liberating after the immense stresses and strains of an Achievist lifestyle taken to the extreme. However, if the organisation is not simultaneously offering the emerging Catalysts with key strategic initiatives to take their hero's journey, they will soon feel contained and inhibited. If they are not being led by Synergist leaders who embrace their divergence, challenging inquiry and growing authenticity, they will feel disrespected. If there is no shared direction or values alignment, they will also feel deflated. As opportunities arise with their growing personal power, they leave. In today's stalled environment, resentment breeds.

Vertical evolution comes in diverse forms. The StageSHIFT approach is one that synchronises vertical leadership development with enterprise evolution by role level.

I've seen problems arising when this is out of synch. For instance, an organisation may have adopted 'AGILE' but its leaders are not sufficiently developed at Catalyst to engage confidently in the collaborative flow. Or they do not have the traction of a significant and meaningful business aspiration to fulfil. Or there isn't enough Synergist leadership at a strategic level to hold the bigger vision. As a result, the promised benefits do not arrive, and people feel out of their depth and even despair despite their many sincere efforts.

One of my most challenging moments was when a leader stood up in a 100-person conference and challenged the entire transformation. I was at a loss for words.

On reflection I realised that it is absolutely essential to honour people to evolve at their own pace while providing all the support for them to do so graciously. Proud Specialists will evolve to Achievist within a performance context e.g. team scorecards and values-based recognition strategies. However, if the role to lead a business unit calls for an Achievist, as it often does, then it's important to place someone with this emergent capacity in the role for them to flourish.

When these types of disconnects and dilemmas arise, it may be useful to ask:

- Does our organisational context support our leaders as we develop them?
- Are we developing our leaders in accordance with their Spectrum Stage Shift?
- Are we matching stage development with relevant role level accountabilities?
- Have we given sufficient latitude for people to flourish at their new altitude?
- Do we have a shared purposeful evolutionary aspirational INTENTION?
- Are we guiding courageous, caring INTERACTION by providing psychologically safe space for people to explore their reactive patterns, triggers and transference?
- Are we leveraging the opportunity to realise the latent potential through the course of INTEGRATION processes and programs that enable personal mastery?



THE 10 INSIGHTS IN VERTICAL EVOLUTION

1. The stages of vertical development form two-step sequences that transform one's identity to the next person perspective. The first step of individuation builds deeper and richer conscious awareness, and the second stage of integration leads to proactive creativity and mastery.
2. The two-step sequences of vertical development alternate between a primary Individual orientation and a primary Collective orientation. At this time, it is our challenge to uplift, reinvent and transform our conventional polarising Collective from a 2nd to a 4th person perspective.
3. We generally range across an average of four neighbouring stages of vertical development, two Individual and two Collective. Our main operating system, called our Centre of Gravity, is our latest integrated stage where we feel confident in our effectiveness as a leader.
4. Being assessed at Synergist is not the same as operating effectively at Synergist. Full maturity at Synergist demands inner and outer mastery of personal and enterprise transformation to let go of the Achievist.
5. As we evolve through the stages and shift our Centre of Gravity to the next integrated stage, we harness more of our human faculties to realise more of our potential. During this journey the quality of our life experience shifts from struggling and striving to thriving and flourishing.
6. If strategic leaders explicitly attend to vertical leadership development as a Spectrum Stage Shift from Achievist to Synergist, they will embark on the Hero's Journey and, with the appropriate coaching support, can forge their new integrated identity at Synergist in one-two years.
7. To master the leadership capacity of a Synergist, the strategic leader must uplift the organisation to accommodate multiple operating levels.
8. The 8 key drivers of strategic holistic leadership development to Synergist are underpinned by setting aspirational intent, learning how to interact with others with courage and care, and integrating shadow resolution with enterprise evolution to liberate their people's potential.
9. The demand on executive coaches to facilitate the vertical evolution of strategic leaders is significant. To gain the confidence of our coachees, we need to be purposeful, explicit, have evolved to Synergist, and be familiar with vertical leadership development and enterprise evolution.
10. To facilitate vertical evolution for strategic leaders to Synergist, it is essential to adopt the next evolution of coaching, transformative coaching, to enable a deeper dialogical and broader partnership to form.



ABOUT DR ANTOINETTE BRAKS

MCC PhD PCASCS.OB MBA.LBS MA LLB(Hons) BA Dip Intl Mktg (Hons)

Antoinette Braks is a Master Certified Leadership Coach and Founder of StageSHIFT Coaching. She completed her PhD in Transformative Coaching in Vertical Leadership Development to Synergist.

She was awarded a CEO Today Management Consulting Award in Leadership Coaching (2020) and is the author of Executive Coaching in Strategic Holistic Leadership: The Drivers and Dynamics of Vertical Development (2020). She has also presented on Vertical Evolution at various global conferences.



Antoinette has coached >4,000 hours with >300 strategic C-suite and divisional leaders across the public and private sectors (avg age 50) over more than 10 years, guiding them to navigate the shift to mature Synergist. 2020 will be the third year she has led and enhanced the 12-month StageSHIFT Coaching Certification Program.

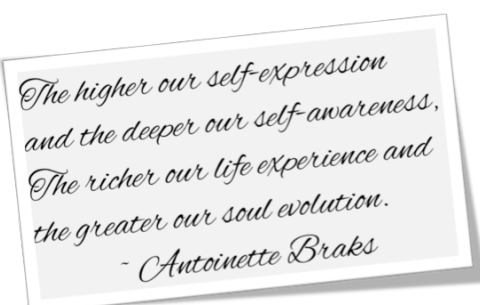
Antoinette is building a global StageSHIFT Coaching Community of Synergist+ executive coaches who undertake executive coaching, leadership development and enterprise evolution programs. They customise the design of transformative vertical programs based on a vertical diagnostic of the enterprise and vertical assessment of its strategic leaders.

Her previous experience includes C-suite leadership of People & Culture at Vector NZ during the merger of their gas and electricity businesses; Regional HR Management with Shell International for Latin America and Africa; Head of Leadership Capital Solutions with Korn Ferry Asia Pacific; and Founder of the Coaching Division with Hudson Talent Management Australia. She has also led strategic culture transformations across sectors and collaborative engagements e.g. the future of the police force and future of education.

Antoinette has a track record of generating extraordinarily swift transformative outcomes e.g. a 20% increase in leadership effectiveness for the top 75 leaders in 12-months; a 30% increase in people engagement in a 1,000-p organisation in 6 months; and a >100% increase in revenues with a 50-p trading company just 3-weeks after implementing the inspiring StageSHIFT business performance and liberating talent frameworks.

She is highly purposeful in her intention to contribute to creating a more sustainable, healthy, equitable and joyful world. Her focus is vertical leadership development and enterprise evolution to guide leaders to realise their potential to Synergist and beyond.

Antoinette has flown solo most of her life and travelled extensively with her work. She has recently moved to the Netherlands, returning to the ancestral home of her parents who immigrated to New Zealand over 60 years ago. She considers herself to be a global citizen and looks forward to contributing to socio-economic evolution around the world.





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Resources & Services

Go to www.StageSHIFT.coach to find many of the above articles and review our services: Executive Coaching to Synergist+, Vertical Leadership and Enterprise Evolution Programs.

Webinars are offered from time to time to offer new insights into vertical evolution.

Go to www.StageSHIFT.coach/webinar

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IN STRATEGIC HOLISTIC
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OF VERTICAL DEVELOPMENT

ANTOINETTE BRAKS



If you are an executive coach, you may also like to take a look at the StageSHIFT Coaching Certification Program at www.StageSHIFT.coach/coaching-certification

Contact: Antoinette.Braks@Join-the-SHIFT.com

"Antoinette's brilliant work creates an effective, practical and grounded approach focused on a pivotal arc in the developmental spectrum." ~ Terri O'Fallon, Founder STAGES International

"[Braks shows us] how executive coaching can become a transformational dialogue: a holistic path that can humanize our world." ~ Reinhard Stelter, Professor Coaching Psychology



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