

The 8 W's of StageSHIFT VERTICAL



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The 8 W's of StageSHIFT VERTICAL

Aristotle's estimation of character and circumstances was based on the following type of inquiry:

1. Why
2. What
3. How
4. With
5. Way
6. Where
7. Who
8. When



The StageSHIFT Spiral of Vertical Leadership Development

Integration	6 TH		Interpenetrative	<i>joy</i>	SOUL	BLISSFUL
Individuation			COLLECTIVE	<i>love</i>	SURRENDER	WONDER
METAWARE TIER						
Integration	5 TH		Active	<i>free</i>	SPIRIT	EASE &
Individuation			INDIVIDUAL	<i>care</i>	GUIDANCE	GRACE
SUBTLE TIER						
Integration	4 TH		Interpenetrative	<i>calm</i>	MIND	EMERGENT
PERSON			COLLECTIVE	<i>flow</i>	INTUITION	FUTURE
SUBTLE TIER						
Integration	3 RD		Active	<i>grow</i>	HEART	CREATIVE
PERSPECTIVES			INDIVIDUAL	<i>play</i>	WILL	STRETCH
CONCRETE TIER						
Integration	2 ND		Interpenetrative	<i>work</i>	EGO	REACTIVE
Individuation			COLLECTIVE	<i>fear</i>	HABIT	PATTERNS
CONCRETE TIER						
Integration	1 ST		Active	<i>take</i>	ID	PRESSING
Individuation			INDIVIDUAL	<i>need</i>	IMPULSE	NEEDS
CONCRETE TIER						
COOK-GREUTER 2-Step Person Perspectives			StageSHIFT		O'FALLON Tiers	
BRAKS Human Faculties & Energy Fields						

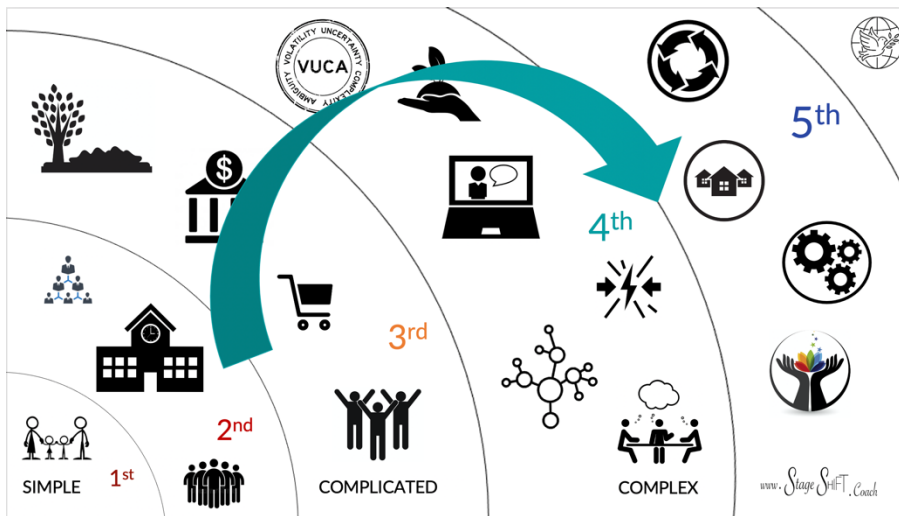


WHY

Why would you be interested in Vertical Development?

The world is crashing into 4th Person Perspective (PP) (Green - Catalyst) exposing many problems caused by prioritising win-lose capitalism, disregarding environmental sustainability, damaging personal and social wellbeing, and excusing systemic unconscious bias at the 3rd PP (Orange – Achievist).

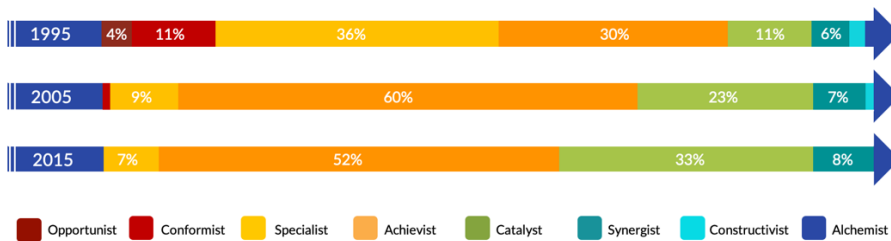
Further, the 4th PP technology is already here in the form of digital mobile interconnectivity and the nine Tech Giants in the US and China that dominate the economy and consumer access to information without ethical policies in place or oversight. The immoral use of this power has altered national election results.



This web of complex issues can only be transcended and resolved at the mature 4th PP (Teal – Synergist). Less mature leaders will attempt to manage or control the fall-out which will result in people movements going underground. This will shift the pendulum from evolution to revolution creating more chaos.

Mature leaders at Synergist and indeed Alchemist (5th PP) can bring a more conscious wisdom and understanding to embrace people’s pain, re-engineer the ecosystemic context to enable everyone to flourish, and model new social, digital, and cultural norms to regenerate the way we live in the world.

However, less than 10% of executives have been assessed at Synergist, even fewer organisations adopt Teal organisational operating systems, and few political leaders model collaborative leadership.



Cook-Greuter, 1999. PwC Report 2015 based on Harthill research data.

Moreover, the proportion of Synergists has only been growing at the rate of 1% per decade, may I repeat that, 1% per decade in the last two decades ... which means that our current leadership development interventions have been insufficient to invite and invoke more mature leadership.

Our current circumstances and past track record suggest that it is imperative to invest in building character in the new and innovative form of Vertical Leadership Development, Vertical Enterprise Evolution and Vertical Ecosystemic Renewal if our civilisation is to thrive and flourish.



WHAT

What is Vertical Development?

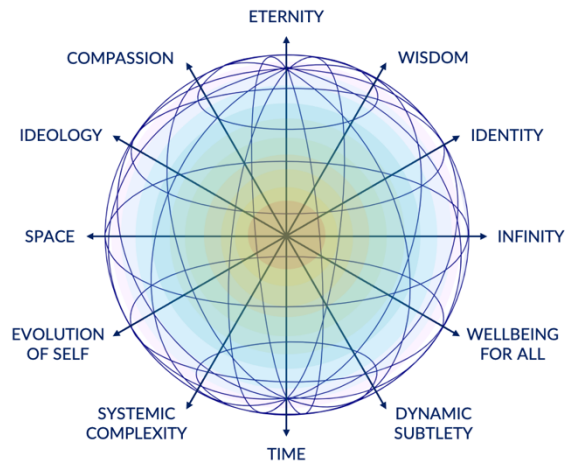
Vertical Development is the expansion of our psychological, cognitive, emotional, and spiritual maturity to perceive, interpret and integrate ever-increasing subtlety and complexity in the world, and then lead others to make decisions and take inspired action increasingly for the benefit of all people, the planet, and all of life over more extensive time horizons.

The paradigm shift from one PP to the next, is a quantum shift in consciousness and leadership capacity.

Maturing into each new PP is like getting an upgrade in the inner operating system of our holistic self gradually embracing the fullness of heart, mind, body, and soul. This is Vertical Development.

Broadening our capacity to perceive, interpret and integrate new knowledge is like adding new apps to our current operating system. This is horizontal development. Both valuable, but different.

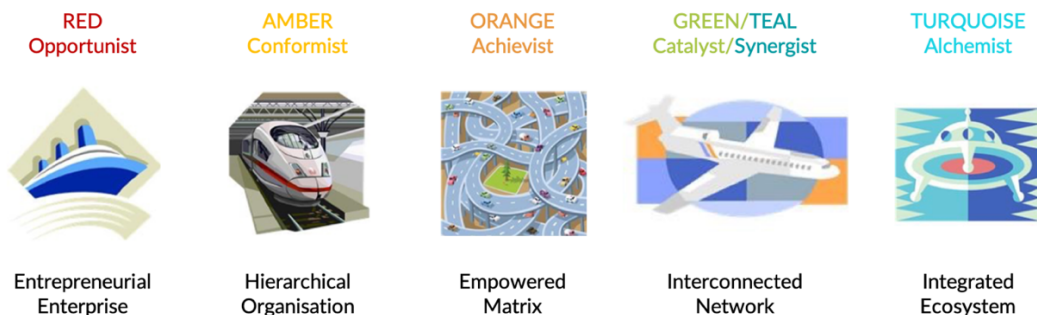
THE SPHERE OF VERTICAL DEVELOPMENT



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Stage SHIFT	work	play	grow	flow	calm	care	free	love	joy
Impulse	Ego	Will	Heart	Intuition	Mind	Guidance	Spirit	Surrender	Soul
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	Rudiestrummer Images

Vertical Development has been broadly applied to the Mind (Kegan; Garvey-Berger); the Holistic Self (Loevinger, Cook-Greuter; O'Fallon); leadership in organisations (Torbert; Rooke; Joseph & Joiner); morals, ethics and values (Kohlberg; Gilligan; Barrett); enterprises (Laloux); and society (Graves; Beck & Cowan). While these are distinctive approaches in focus and application, they largely share a common view of the nature of the stages of development and the increasing leadership capacity at each stage.





HOW

How does vertical development take place?

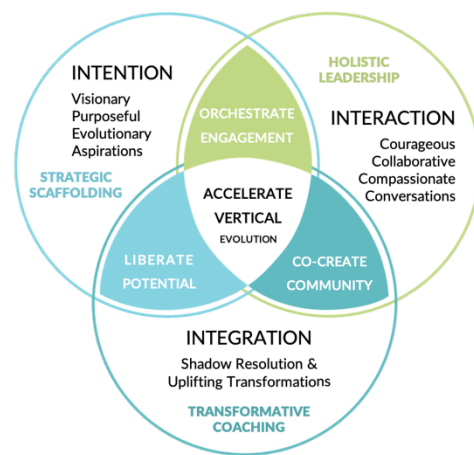
Earlier research suggested that the trigger for vertical growth comes in the form of major life challenges or disorientating dilemmas that could not be understood and resolved from a person's current perspective (Piaget; Mezirow). Thus, the recommendation for heat experiences and colliding perspectives in the workplace to challenge a person's current worldview (Petrie).

There is also the quantum shift from a fixed mindset to a growth mindset (Dweck) that facilitates vertical development; the embrace of positive psychology (Fredrickson; Seligman); and exploring our immunity to change (Lahey & Kegan). However, these interventions are largely limited to the development of a mature 3rd PP whereas the main issue is how strategic leaders adopt the later stage 4th PP.

Through our research, we found that there are 8 drivers in Vertical Development to Synergist, underpinned by three underlying principles: Intention, Interaction, and Integration.

The 8 Drivers cast a wide net across Holistic Leadership Development and Strategic Enterprise Evolution. They incorporate key elements such as aspirational intent and shadow resolution that are not often explicated in leadership programs.

They also incorporate shifts in the operating context that demand later stage leadership and simultaneously evolve the enterprise to enable each level within the organisation to rise.



How long does it take to shift stages?

Ten years ago, it was thought to take five-six years to move to the next stage unless you were involved in a 20-day retreat-style Integral Leadership Program where most people shifted a stage over a year or two (Brown). However, StageSHIFT research has taken the lid off vertical transformation.

In our research, 80% of strategic leaders shifted a full stage to Catalyst or Synergist in just one year after an average of 8 StageSHIFT transformative coaching/consulting sessions, and the remaining 20% shifted two stages to Synergist in the one year! These were remarkable findings.



Moreover, in leading transformation using the StageSHIFT approach, Leadership Effectiveness has increased by 20% in 21-months (measured by The Leadership Circle); People Engagement has lifted by 30% in just six months – both in 1,000-person organisations; and business revenues have leapt by 100% within a 50-person trading company just three weeks following implementation.

The integrated systemic StageSHIFT technology embracing the holistic self, enterprise evolution and ecosystemic renewal facilitated by 3rd generation transformative coaching incorporating consulting, guidance, and therapeutic interventions, leads to accelerated vertical development. The StageSHIFT philosophy of life accommodates and lifts all perspectives to realise extraordinary outcomes.



WITH

With which tools and technology were StageSHIFTS accomplished?

StageSHIFT tools include the Vertical Holistic Leadership Profile (revised and updated), the Vertical Strategic Enterprise Profile (emergent prototype) and StageSHIFT Vertical Transformative Coaching.

The Vertical Holistic Leadership Profile (VHLP)

The VHLP is an automated self-assessment against 144 executive leadership capabilities based on 4 Lines, 5 Leads and 6 Levels of Leadership. The VHLP Report is a 40p workbook document designed to introduce senior executives and strategic leaders to the concept and construct of Vertical Development.



LQ	Leadership Presence	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist
AQ	Action Orientation	Doing	Performing	Instigating	Generating	Cultivating	Visionary
EQ	Emotional Awareness	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion
MQ	Mindful Attention	Thinking	Planning	Interpreting	Integrating	Transcending	Wisdom
SQ	Spiritual Congruence	Creating	Designing	Innovating	Transforming	Inspiring	Wizardry
	Relevant Role Level	S Self	M Manager	L Leader	XL Executive	XXL Group Exec	XXXL Global

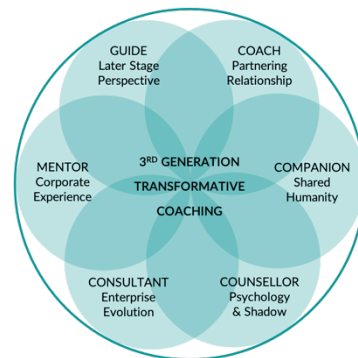
The Vertical Strategic Enterprise Profile (VSEP)

The VSEP is a StageSHIFT consulting tool to calibrate the vertical level across 6 lines: IMPACT: Intent, Meeting, People, Agility, Culture and Technology, 4 elements, and 5 levels of enterprise evolution.

It involves a strategic review of business and organisational frameworks and processes, and interviews with your key executives to understand your history, culture and current dilemmas, to make a vertical assessment of the structures, dynamics and mindsets that are alive today. Your StageSHIFT Vertical Transformation Program is then customised based on this vertical calibration in partnership with you.

StageSHIFT Vertical Transformative Leadership Coaching (VTLC)

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 Ontological	Psychodynamics Complex Systems
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	ACHIEVIST	CATALYST	SYNERGIST



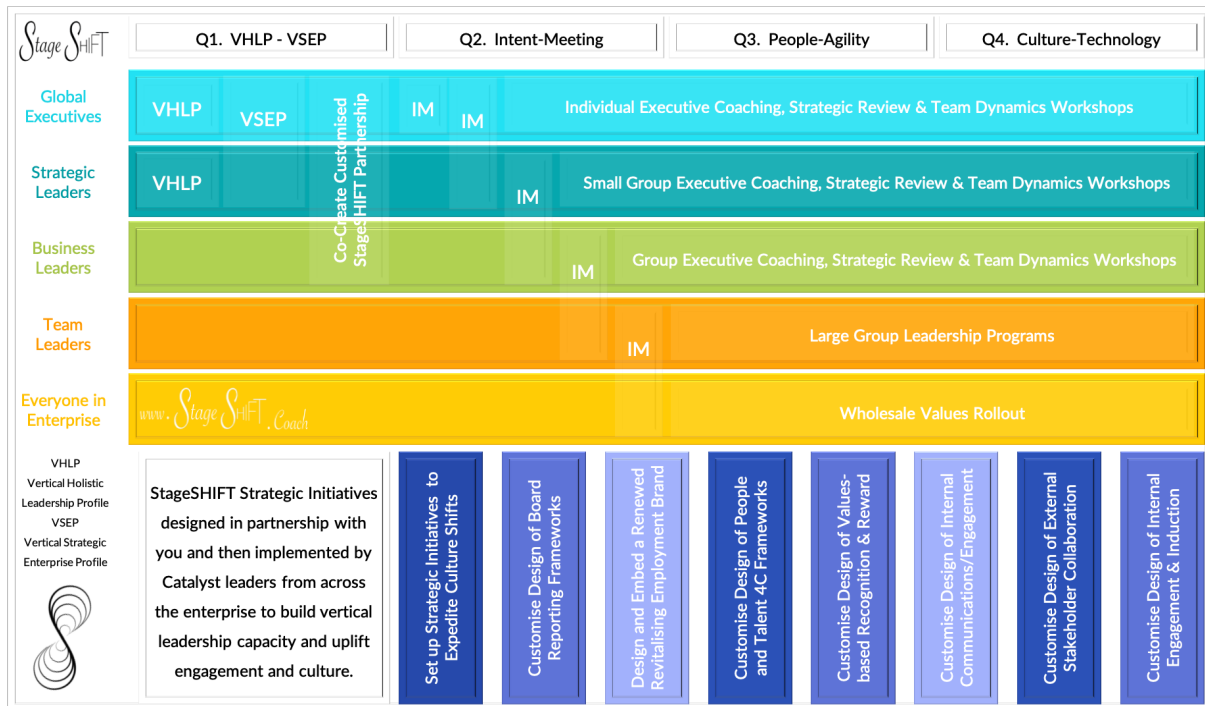
Transformative coaching is the 3rd generation of coaching that goes beyond the remit of developmental coaching. While it paces coaching in line with the coachee's inquiry, transformative coaching is much more powerful. The coach also inspires vertical development with the articulation of aspirational intent, offers new insights from their later stage perspective that are not accessible by the coachee, enables shadow resolution and invites the coachee to implement proven approaches that reengineer their systemic context. This invigorating and uplifting dialogical partnership expedites Vertical Development.



WAY

In what ways has the StageSHiFT proven pathway been implemented?

Our implementation is strategic, holistic, integral, and systemic. We partner with leaders, level by level top-down, to recreate and refine their Purposeful Business Intent and their Dynamic Operating Rhythm. The new Business Charters quickly and effectively build the Strategic Business Scaffolding on top of and around the current organisation to liberate latent talent and expand the space for creative initiative.



While the content of the StageSHiFT Leadership Programs and Consulting Frameworks draw on the proven holistic levers to stimulate and generate later stage development, the strategic initiatives are designed to re-engineer the Enterprise Operating System to Green and Teal, especially People and Culture and Business Reporting frameworks. They uplift and evolve the broad systemic context.

We create a series of annual runways for the delivery of leadership development programs and stewardship of strategic initiatives to orchestrate participation and facilitate emergent flow. We hold the organisation as a whole with an integrated delivery system that is both organic and coherent. By listening into the organisation, we adjust the traffic flow to match the appetite and reconcile competing demands.



StageSHiFT Programs blend content-based online self-study with live online individual executive coaching, strategic team workshops and group coaching workshops run as Discovery Dialogues. Our spread of StageSHiFT coaches around the world, all at Synergist and beyond, facilitate these workshops.

The 2-3-year partnership with StageSHiFT arises from its co-creation, the continuous cross-fertilisation of ideas, and the collaboration with leaders to synchronize the program with their emergent needs. All programs and initiatives are customised to the unique situation your organisation is in, your budget, and the speed and agility with which you wish to realise a quantum shift in outcomes.



WHERE

Where has Vertical Development been proven to be valuable?

Kuhnert, former Chair of Org Psych at the University of Georgia US, found that an executive's stage of development was positively and significantly related to their overall 360 leadership effectiveness rating and indeed could predict their 360 rating. Executives at later stages were significantly more effective at Visioning, Personal Grounding, Leading Change, Catalysing Teams and Cultivating Talent.

Rooke and Torbert found that, amongst 10 longitudinal studies of organisational transformation, the seven which prospered to become unique industry leaders were led by CEOs at Synergist or built a trusted relationship with external consultants at Synergist and Alchemist. The three unsuccessful CEOs were all at earlier stages of development. Another study also found that 11 of 64 internal consultants assessed at Synergist were much more effective transformative leaders than others at earlier stages.

When Graves put together various groups of executives by stage and invited them to solve problems with multiple answers, he found that Synergists found unbelievably more solutions than all the others put together. The quality of their solutions was also amazingly better and the time it took them to arrive at a solution was significantly shorter than any of the other groups.

Research across theorists has shown Synergists to be significantly more effective leaders and the first level of leaders able to lead and sustain collaborative, transformative, visionary, ecocentric renewal. Synergists can also lead genuinely purposeful organisations that uplift their culture and enhance business performance.

Research by Professor Raj Sisodia shows that purpose-led companies significantly outperformed the S&P 500 between 1996 and 2011 (Firms of Endearment, 2014). The Gartenberg study found that a clearly communicated purpose led to a positive impact on financial performance and stock returns in a study of 500,000 people across 429 firms over five years from 2006 to 2011 (Quinn HBR 2018).

In companies that have clearly defined and communicated how they create value for their customers, 63% of employees say they're motivated vs. 31% at other companies; 65% say they're passionate about their work vs. 32%. More than 90% of these purpose-driven organizations deliver growth and profits at or above the industry average, based on strategy research and analyses (Blount HBR 2019).

Where has StageSHIFT been effective before?

StageSHIFT case studies have found that:

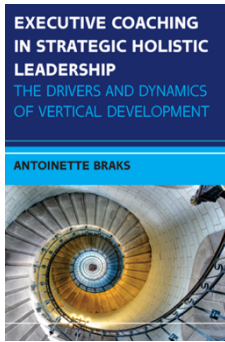
- 80% of strategic leaders navigated a full StageSHIFT in one year and 20% shifted twice following a 12-month Executive Coaching Program with an average of 8*90-min coaching sessions.
- 21 months following the implementation of a StageSHIFT strategic leadership development initiative for the top 75 strategic leaders of a 1,000-p public sector organisation, there was a quantum shift of 20% in Leadership Effectiveness increased.
- Six months into the implementation of a broader StageSHIFT strategic, culture, talent, and performance transformation with a 1,000-p business services organisation to realise a quantum shift to >90% in customer satisfaction, People Engagement had lifted by 30%.
- Three weeks following the implementation of StageSHIFT strategic, talent, and performance frameworks in a small trading company of 50 people, their Business Revenues more than doubled and this doubled workload was also handled seamlessly by the administrative team.



WHO

Who will you be collaborating with at StageSHIFT?

The founder of the StageSHIFT Global Coaching and Consulting Community is Dr Antoinette Braks.



Antoinette Braks is a Master Certified Coach, has a PhD in Developmental Psychology and Transformative Coaching, an MBA from London Business School, and is the author of [Executive Coaching in Strategic Holistic Leadership: The Drivers and Dynamics of Vertical Development](#) (McGraw Hill 2020). She received the [CEO Today 2020 Management Consulting Award in Leadership Coaching](#).

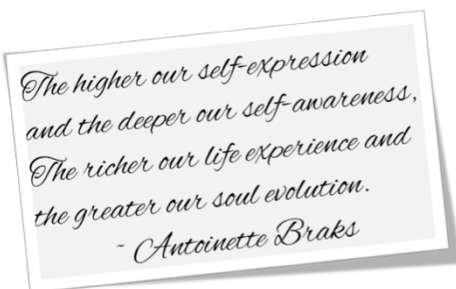
"Antoinette's brilliant work creates an effective, practical and grounded approach focused on a pivotal arc in the developmental spectrum." ~ Terri O'Fallon

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

Her PhD builds on a lifelong commitment to study following an Honours degree in Law, BA in Political Science, an MBA from London Business School, an MA in Management Research and Advanced Study in Coaching Supervision at Oxford Brookes University.

Her purpose has always been to enable people to realise their potential i.e., to become aware of, and to manifest, their latent leadership capacity.

After an early career in executive search and selection, Antoinette shifted to organisational development followed by leadership development. She flourished in global executive roles with Shell in Latin America and Africa, and with Korn Ferry across Asia Pacific. She also led People and Culture with Vector, New Zealand's innovative energy infrastructure company, and inaugurated the Executive Coaching Division with Hudson Australia.



In recent years she has led organisational vertical transformations and distilled the theory and principles behind the effectiveness of the StageSHIFT Transformation Programs with an extensive Coaching Certification Program in Vertical Development.

As a mature Alchemist, Antoinette's purposeful intent is to architect and engineer the intrinsic evolutionary capacity of the organisation, its people and all stakeholders, at all stages of development, to build a more sustainable, healthy, equitable and joyful world for all.

The Global StageSHIFT Community of Transformative Coaches and Vertical Consultants

The 30 and growing number of StageSHIFT Coaches and Consultants are spread across 16 countries in Europe, the United States, Russia, Asia, and Australia. They are highly experienced outstanding leadership coaches and consultants, most of whom have enjoyed extensive international careers, and have invested significantly in their vertical development to hold their Centre of Gravity at Synergist or Alchemist.

This later stage perspective that each StageSHIFT Coach and Consultant brings to Group Discovery Dialogues, has the effect of deepening, extending, and accelerating individual leadership development for your global, regional and divisional strategic leaders to Synergist, and, we've found, to Alchemist too. All business leaders, managers and individual contributors in the organisation are uplifted through our Strategic Initiatives and Leadership Programs appropriate to each role/stage level across the enterprise.

See our global community of coaches on our website <https://www.stageshift.coach/coaches>



WHEN

When would you like to invest in Vertical Development?

It's time.

Current leadership programs are not working.

We need to go vertical to transcend the turbulence and flourish in emergence.

We can help you. Take inspired action now. StageSHIFT offers you a unique promise.

StageSHIFT Coaching & Consulting promises quantum leaps in leadership effectiveness, people engagement, conscious culture and business performance. We're renowned for accelerating our clients' capacity to realise extraordinary outcomes through our unique and proven blend of strategic enterprise evolution, vertical holistic leadership development and transformative executive coaching! We partner with CEOs and Strategic Leaders to design and engineer a liberating Teal Enterprise that empowers and energises their people to trust their creative ingenuity and swiftly realise visionary, purposeful and aspirational conscious ecocentric outcomes.

- Global Representation *25 highly qualified coaches spread around the world ...*
- Later Stage Coaches *Are the people at the later stages of Synergist and Alchemist?*
- Own the Holistic Self *Mind, body, heart, and soul ~ shadow resolution is essential ...*
- Blended Online Learning *Proven distilled content that is stage and role appropriate ...*
- Accelerated Results *We realise 4 times the outcomes in 10% of the time invested ...*
- Leading Edge of Evolution *We're Turquoise innovating at the growth edge of our evolution ...*
- Promise of Outcomes *Is it a proven business methodology with trusted outcomes?*
- Intersystemic Renewal *Beyond the organisation to the ecosystem as well as within it ...*
- Vertical Orientation *Horizontal will always be present, but is it Vertical?*
- Organisation and Leaders *Realise Teal / Synergist by executing both simultaneously ...*
- Tools: VHLP and VSEP *Technology that calibrates vertical evolution ...*

Is it time for your GLOBAL PIVOT?

We're keen to build partnerships to design, direct and deliver enterprise and leadership transformations.

If you'd like to find out more about us and/or read a curated set of articles on vertical development, leadership programs and/or transformative coaching, including our own special accounts of The Top Ten Insights into Vertical Development 2020 and How to Make a Perfect Soufflé in Vertical Development, go to <https://www.stageshift.coach/>

Please feel free to email or arrange a meeting to find out how StageSHIFT could help you.

Dr. Antoinette J Braks PHD MBA.LBS

Founder StageSHIFT Community

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