



Stage SHIFT

VERTICAL HOLISTIC LEADERSHIP PROFILE

Sample Participant

23 Jul 2021



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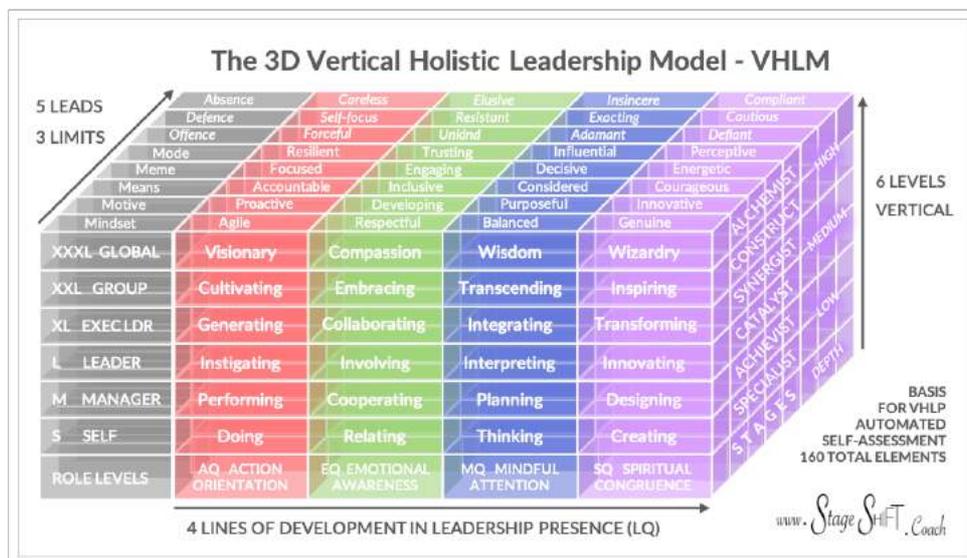
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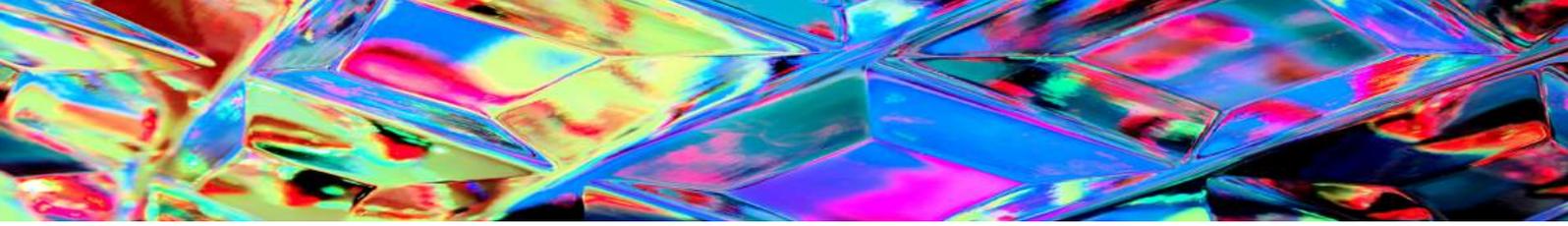
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PART I

StageSHIFT MODELS





WELCOME to the StageSHIFT Community

Thank you for undertaking the Vertical Holistic Leadership Profile (VHLP). We hope you gain lots of valuable insights from your VHLP Report to inspire and accelerate your evolving leadership journey.

StageSHIFT Purpose and Values

The great transition we are currently immersed in demands leadership at the later stages of mature Synergist and Alchemist, occupied by less than 10% of executives today. Only at these levels do we have the calm authority, strategic clarity and compassionate integrity to innovate collaboratively with a view to realising long-term eco-centric outcomes that serve society. Conscious capitalism is just the beginning.

StageSHIFT's Visionary Purpose is to inspire, ignite and expedite vertical leadership development, enterprise evolution and ecosystemic renewal to realise our power to build a more sustainable, healthy, equitable, kinder, and joyful world for all.

***Our Evolutionary Values are to realise more POWERFUL leadership by bringing more:
Peace | Order | Wisdom | Enlightenment | Reverence | Freedom | Unity | Love into the world.***

StageSHIFT Global Community of Transformative Coaches

Our global community of Synergist/Alchemist executive coaches and consultants, all certified in a rich and extensive StageSHIFT Coaching Certification Program, offer Transformative Vertical Coaching in Holistic Leadership Development and Strategic Enterprise Evolution. Our proven evidence-based coaching and consulting approach guarantees swift StageSHIFTS to later stages including Synergist/Alchemist and Green/Teal, in just 1-2 years. From these levels we can create the world anew, resolve the complex problems arising from unbridled capitalism and build new ecosystemic norms.

StageSHIFT has the global multilingual reach to partner with you to evolve your enterprise and lift your leadership capacity. We guide organisations to elevate their purpose and culture, rise above the turbulence, and flourish in conscious emergence. We are committed to serving society and regenerating our way of life to realise a more sustainable, healthy, equitable, kinder, and joyful world by 2030.

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Founder of the Global StageSHIFT Coaching & Consulting Community



The Stages of Leadership Development

Maslow was the founder of humanistic psychology. His famous Hierarchy of Needs set the scene for actualising our human potential to lead more purposeful, aspirational, and meaningful lives. He suggested that self-actualisation involved becoming more aware, authentic, inclusive, and accepting of self, others, and nature.



While Maslow (1962) focused on the motives to leading a more fulfilling life, Kegan (1976) identified the means. Continuing from development in childhood (Piaget), our adult mind makes quantum shifts in the calibration of the lens we use to perceive, interpret, and understand increasing levels of complexity and subtlety across longer term time horizons. Life is not simply an objective reality. It is objective and subjective. What we perceive depends on the lens we look through – the lens of our mind. Kegan constructed four levels of Mind shown in the Table below.

Loevinger (1976) embraced the more holistic concept of ego development including mind, heart, and spirit, and calibrated more elaborate stages of vertical development. Cook-Greuter (1999) extended and enriched this Stages Model by identifying more later stages, the successive Person Perspectives embedded in Stage Development and the two-step process of individuation and integration to adopt each one.

O'Fallon (2011) has since underpinned the model with new research findings illuminating an iterative four-step sequence through Three Tiers of Transformation. This adds significant sophistication to a systemic understanding of vertical stage development beyond Kohlberg's (1976) phases of evolution.

Kohlberg PHASES	Kegan Subject/Object The Mind Adult Development	Cook-Greuter Leadership Maturity Framework Mature Adult Profile MAP	Rooke Harthill Leadership Development Framework Action Logics	Torbert Global Leadership Profile Action Logics	Joseph & Joiner Leadership Agility Framework	O'Fallon STAGES International Profile	Braks StageSHIFT Vertical Holistic Leadership Model VHLP	O'Fallon TIERS
Pre-Conventional	Impulsive	Self-Centric	Opportunist	Opportunist		1.0 Impulsive	Impulsivist	CONCRETE
			Impulsive	Impulsive		1.5 Egocentric	Opportunist	
Conventional	Socialised	Skill-Centric	Expert	Expert	Expert	3.0 Expert	Specialist	SUBTLE
			Achiever	Achiever	Achiever	3.5 Achiever	Achievist	
Post-Conventional	Self-Transforming	Self-Actualizing	Individualist	Redefining	Catalyst	4.0 Pluralist	Catalyst	METAWARE
			Strategist	Transforming	Co-creator	4.5 Strategist	Synergist	
Post-Conventional	Self-Transforming	Construct-Aware	Alchemist	Alchemist	Synergist	5.0 Construct-Aware	Constructivist	METAWARE
			Ironist			5.5 Transpersonal	Alchemist	
Post-Conventional	Self-Transforming	Construct-Aware	Ironist			6.0 Universal	Ironist	METAWARE
			Unitive			6.5 Illumined	Holist	

The cycle of leadership development through the stages is invariable and accumulative like a set of Russian dolls. Stages cannot be skipped. Each becomes a foundation for future character development as strengths and shadow are respectively included and transcended to realise new levels of consciousness. The mind embraces increasing complexity and develops wisdom; the heart appreciates greater subtlety and develops compassion; while the spirit uplifts personal identity with a more enlightened ideology.



THE STAGES OF VERTICAL LEADERSHIP DEVELOPMENT



TRANSPERSONAL

POST-CONVENTIONAL

CONVENTIONAL

METAWARE

SUBTLE

CONCRETE

<i>joy</i>		Holist 'inspires all'	Life is a universal mystery Emptiness and fullness Lightness, timeless, boundless Oneness, formless, emptiness Fullness of love experience Luminous self as spirit and soul	
Ironist 'generates love'		Life is a cosmic tapestry Fullness of compassion Perceives passing of ages Timely world-centric action Sees impact of butterfly wings Fully surrenders the will		<i>love</i>
<i>free</i>		Alchemist 'evolves society'	Life is a vast theatre Empty open mind Integrates material and spiritual Sees repeating eternal patterns Order and mess are okay Social transformation	
Constructivist 'frames reality'		Life is a voyage into the unknown Takes reverent care of life Constructs reality with thought Sees own projections instantly Perceives eras of civilisation Collective shadow arises		<i>care</i>
<i>calm</i>		Synergist 'leads evolution'	Life is systemic transformation Sustainable change Mutual collaboration Orchestrated and eco-centric Vigilant and vulnerable Purposeful fulfilment	
Catalyst 'is authentic'		Life is a hero's journey Reflective and insightful Collaborative change agent Interweaves across stakeholders Generates unique perspectives Follows intuition over logic		<i>flow</i>
<i>grow</i>		Achievist 'gets results'	Life is for striving and winning Sets and juggles priorities Positive, pragmatic planner Always "busy", wanting "more" Proactively achieves team goals Feedback fosters better results	
Specialist 'develops skills'		Life is an effort to excel Logic and expertise prevail Quality continuous improvement Highly critical and perfectionist Always "Not good enough" Takes feedback personally		<i>play</i>
<i>work</i>		Conformist 'by the rules'	Life is a struggle Right and wrong Enjoys belonging Follows directives "Us" and "them" Takes zero-risk	
Opportunist 'on the take'		Life is threatening Acts in self-interest Steals ideas, blames others Closed to feedback Seizes opportunities Attacks to defend		<i>take</i>



The 2-Step Square Dance of Evolution

StageSHIFT draws on this scientific history and wealth of vertical development experience to integrate:

- The Stages of Leadership Development with a synthesis of successive Human Faculties
- The Two-Step Square Dance in the Spectrum StageSHIFT to the next Centre of Gravity
- The impact of Self-Expression on our Life Experience in relation to Spectrum StageSHIFTS.

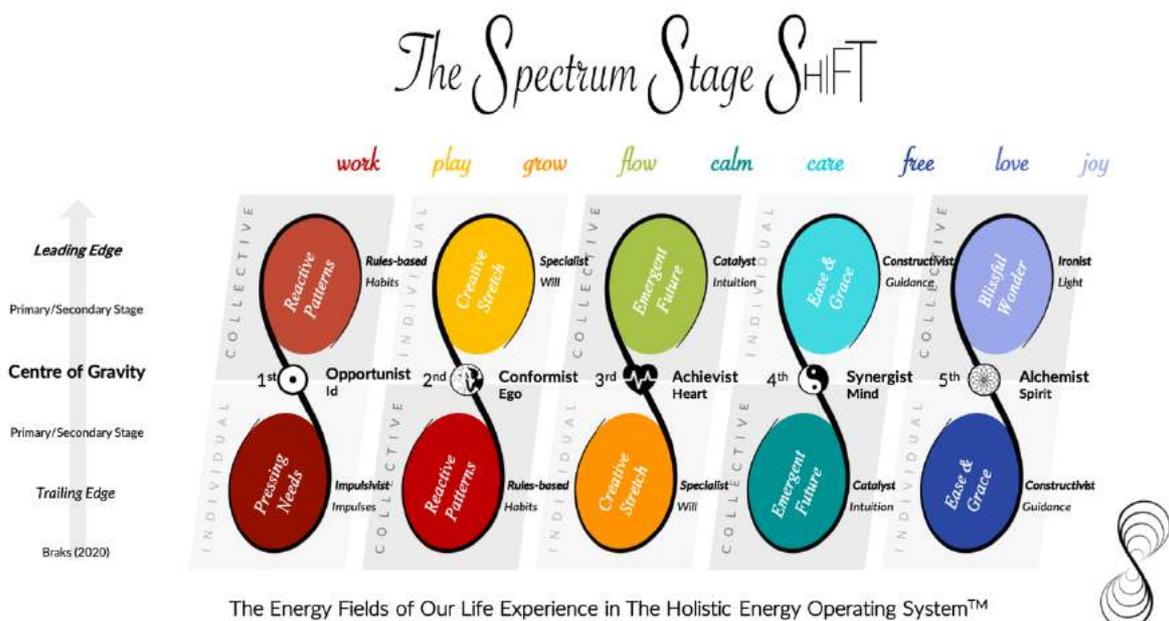
The two-steps taken to adopt each new Person Perspective are Individuation and Integration. A person is most confident when they have their Centre of Gravity in the second Integration step of development. It is then that they can translate their expanding awareness into inspired action such as driving outcomes at Achievist, transforming systems at Synergist and evolving society at Alchemist.

These two steps alternate between a primary Individual and a primary Collective orientation, as most people travel along a spectrum of four stages of development, two Individual, and two Collective. Together they form the StageSHIFT 2-Step Square Dance of Vertical Development.

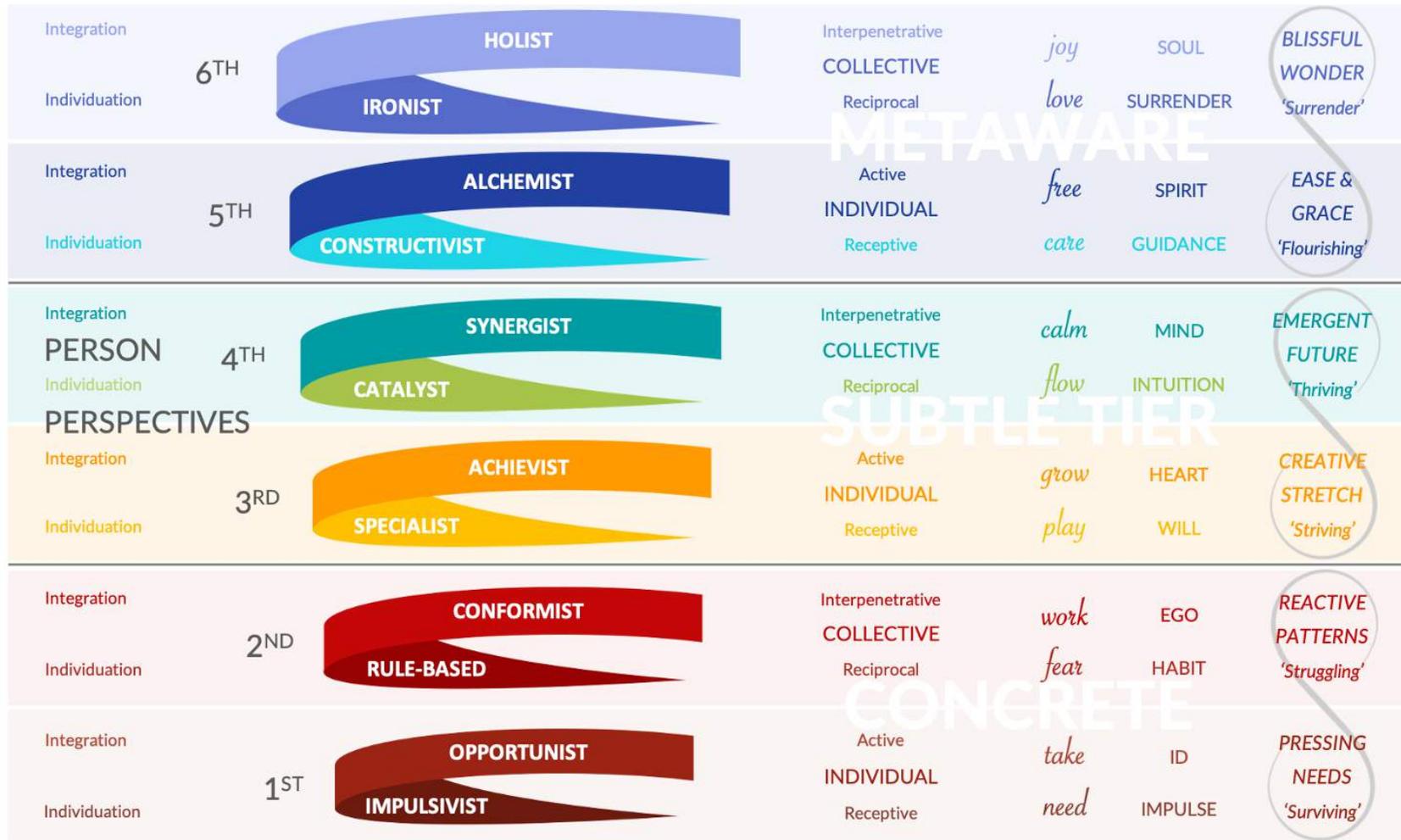
The StageSHIFT Spiral Model is shown on p.8.

This 2-Step Square Dance iterates through the three Tiers: Concrete, Subtle and MetAware. The 1st step in the Individual zone is defined as Receptive; the 2nd step as Active. The 1st step in the Collective zone is termed Reciprocal; and the 2nd step is Interpenetrative. The nature of vertical leadership development is more explicitly a Spectrum StageSHIFT from one Integration step to the next, every two stages.

Further, our life experience shifts with our Centre of Gravity. At Opportunist, we survive and struggle. At Conformist, we struggle and strive. At Achievist, we strive and thrive, while at Catalyst, we thrive and flourish. At Synergist we flourish with ease and grace; and at Alchemist, we're at ease with surrender. These Energy Fields of our Life Experience are captured in the following diagram.



THE Stage SHIFT Spiral OF VERTICAL LEADERSHIP DEVELOPMENT



COOK-GREUTER 2-Step Person Perspectives

O'FALLON Square Dance in Tiers

BRAKS Human Faculties & Energy Fields



The Stages of Enterprise Evolution

The stages of Enterprise Evolution follow the same spiral dynamic as the stages of leadership development. Systems of transport offer a useful analogy for each level of Enterprise Evolution.

Red entrepreneurial enterprises can be compared to boats and ships at sea where they are relatively free to navigate. As organisations evolve to amber, they adopt hierarchy and scale like a rail network. There are set tracks to travel on, defined destinations and detailed timetables, a set number and order of carriages – everything is planned, scheduled, monitored and streamlined. There are few choices for people, but scalability is extensive. This regimented approach facilitated the growth of hierarchies.



The shift to orange or an empowered matrix becomes more creative and messier as is the road transport network of highways and byways. Drivers can choose from a range of vehicles, travel singly or as a group, and are free to find their own way to their specific chosen destination. This is often reflected in organisations as an empowered matrix where people choose from a sometimes-conflicting array of national, regional, and global stakeholders, goals, and priorities. The culture is very busy, fast, and driven.

At Green, there is lift-off. With a shared visionary direction and agreed values, everyone flies together to realise bolder audacious goals within an agile flight network. The business becomes a more conscious enterprise where attention is given to the engagement, participation and development of everyone involved in the organisation, within and outside its immediate borders. As the flight analogy involves interconnected airline networks, the organisation evolves to a more collaborative conglomerate at Teal.

The enterprise then evolves to Turquoise as it adopts a spaceship hub model where people are liberated and trusted to make most decisions in a decentralised yet integrated complex adaptive ecocentric ecosystem. The open systemic governing context and the purposeful aspirational intent to serve society and the world at large forms an interweaving tapestry for everyone to make meaningful contributions.

The stages of leadership are held within each stage of Enterprise Evolution i.e., Achievists thrive in an empowered Orange matrix; Catalysts become essential in an agile Green network; Synergists build and lead integrated Teal enterprises; and Alchemists forge multisector collaborative ecosystems at Turquoise.

LATER STAGE ENTERPRISES ACCOMMODATE A SPECTRUM OF STAGES

Mature enterprises accommodate a broader spectrum of levels and stages. People at operating levels contribute efficiently at Specialist, while business unit leaders at Achievist focus their teams on realising shared outcomes. Any roles requiring broad internal and external stakeholder engagement and agile process-based collaborative innovation need change leaders and culture champions at Catalyst. Highly effective regional, divisional, and C-suite leaders are Synergists who lead collaboration across diverse functions and regions, while the most effective global C-suite leaders lead ecosystems from Alchemist.



The Vertical Holistic Leadership Model (VHLM)

The StageSHIFT Leadership Model interconnects Vertical Leadership Development through the stages with role levels in an organisation. There are **six levels** of vertical development across **four lines** of Holistic Leadership Development: will, heart, mind, and spirit. These four lines or dimensions of development are termed Action Orientation, Emotional Awareness, Mindful Attention and Spiritual Congruence: AQ, EQ, MQ and SQ, respectively. Together they form Leadership Presence, LQ.

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 Table's bottom row clarifies the most appropriate role **level** for each primary **stage** of development.

Most people begin with a preference for two of the four Q dimensions e.g., thinking-doers or creative-doers. These preferences become initial strengths and form the foundation of their leadership **style**.

It is important that this preferred **style** of leadership reflects a person's **type** of role, just as their **stage** of leadership development reflects the **level** of their role. These two aspects of role-fit facilitate engagement, performance and fulfilment. A lack of fit on either dimension has been shown to have a significant negative impact on wellbeing, team dynamics, corporate culture and business performance.

As a person evolves their spectrum of **stage** development, they expand their vertical leadership capacity by expanding their preferred **style** to incorporate the other dimensions. Underplayed styles create Blind Spots and overplayed styles become Stressors. It is useful to **extend** vertically with a person's style preferences, their Stretches, and then **expand** their leadership capacity with the other style dimensions.

The four dimensions of leadership are each split into **five leads** of development identified as key capabilities, and **three limits** on development in the form of shadow, as shown in the Table below. Each capability is defined at each stage of vertical development. For instance, the first capability 'Agile' (AQ/Mindset), is articulated to reflect each of the six stages of vertical development. There are three statements for each Shadow element calibrated at Low, Medium and High. A total of 160 Statements.

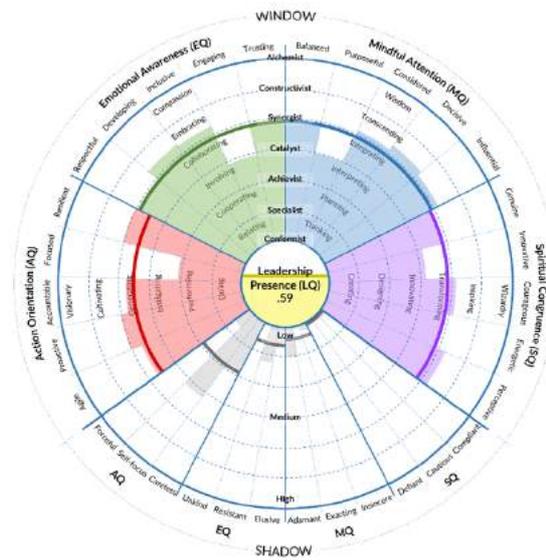


LQ	AQ	EQ	MQ	SQ
Leadership Presence	Action Orientation	Emotional Awareness	Mindful Attention	Spiritual Congruence
Mindset	Agile	Respectful	Balanced	Genuine
Motive	Proactive	Developing	Purposeful	Innovative
Meme	Accountable	Inclusive	Considered	Courageous
Means	Focused	Engaging	Decisive	Energetic
Mode	Resilient	Trusting	Influential	Perceptive
Offence	Forceful	Unkind	Adamant	Defiant
Defence	Self-focus	Resistant	Exacting	Cautious
Absence	Careless	Elusive	Insincere	Compliant



PART II

VERTICAL HOLISTIC LEADERSHIP PROFILE



Stage SHIFT Wheel



Your Vertical Holistic Leadership Profile

YOUR VERTICAL HOLISTIC LEADERSHIP PROFILE

Over the following pages, you'll find the outcomes of your individual self-assessment. The VHLP Wheel summarises your Leadership Presence. Check which of the four lines of development, AQ, EQ, MQ and SQ, are stronger in your profile. They indicate your leadership style preferences.

The final quantitative rating is based on the weighted average ratings of your assessments of each capability less those of your shadow elements.

YOUR SPECTRUM OF STAGES, WINDOW/SHADOW

The spectrum of stages around your quantitative rating are shown on a bar graph on the next page.

This is followed by two Tables that order your window capabilities and shadow elements from highest to lowest ratings based on your weighted average rating for each element. This weighted average rating is based on your self-assessments at the six progressive levels of development for each window element - capability, and at the three successive levels of depth for each shadow element.

This is followed by two comprehensive Tables documenting your assessments for the window elements associated with each capability at each of the six levels of vertical development, and the corresponding shadow elements across AQ, EQ, MQ and SQ at each level of depth for shadow. This completes the summary of numerical data.

YOUR STRENGTHS, STRESSORS, BLIND SPOTS & STRETCHES

Next are four separate Tables setting out your top seven Strengths, Stressors, Blind Spots and Stretches. These are based on your assessments for each capability and shadow element. If a full set of seven is not shown in each category, then insufficient assessments met the criteria for that category.

To facilitate your vertical development, take a thematic approach to analysis. This is more conducive to raising self-awareness than a gap analysis related to your role. Note the phrases and themes that most resonate with you and consider the reflective questions to explore your assessment further.

MIND MAP THE RESONANT THEMES IN YOUR PROFILE

Now it's time to complete the Mind Map Matrix to gain an overall perspective of your assessment. Take a much larger piece of paper if you prefer. While the report is analytically robust, it is your own exploration of the underlying reasons or motives for your resonance and/or dissonance with the statements and phrases within them, from which you will gain the most valuable insights and revelations.

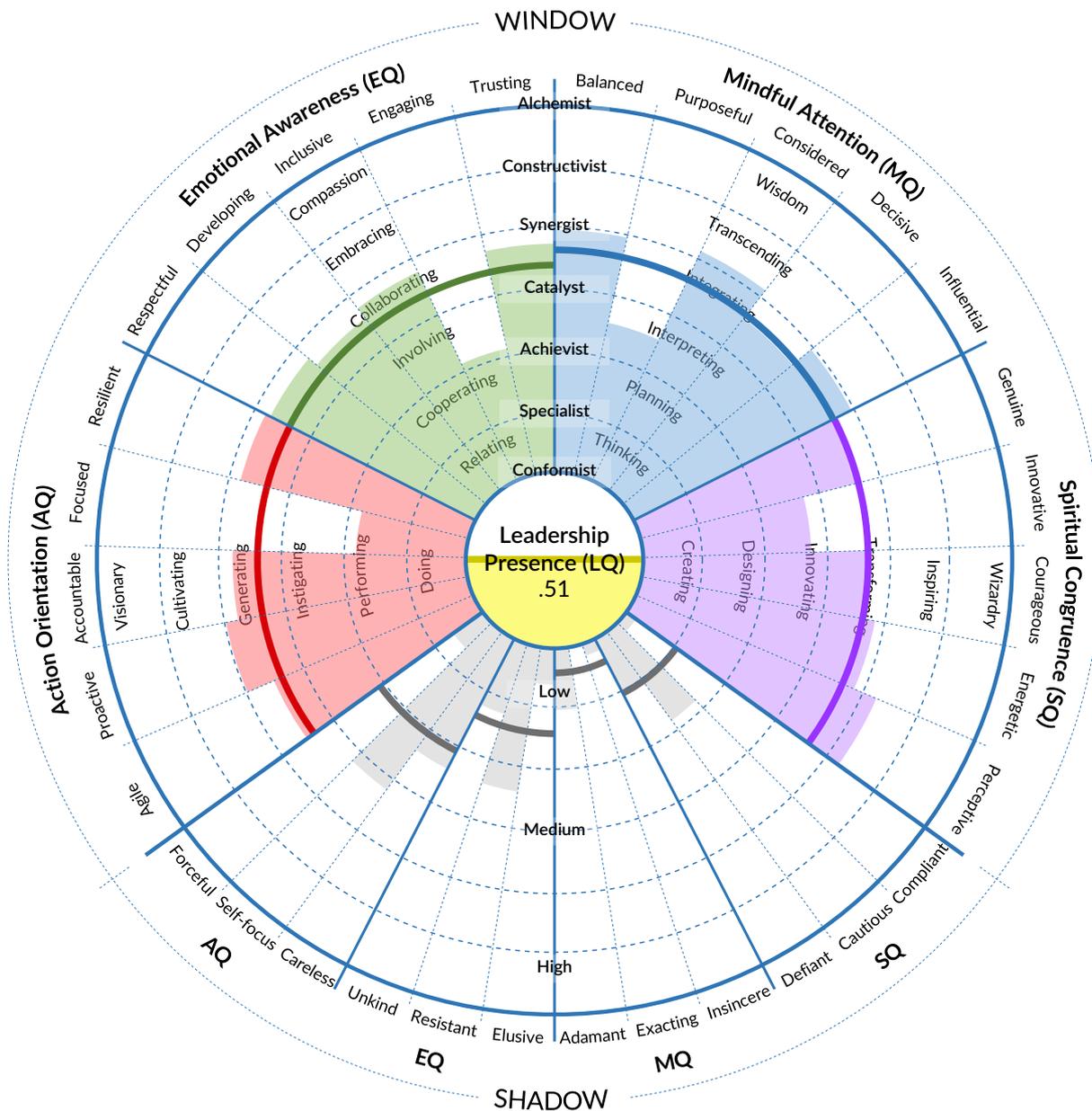
Ideally you will complete this step prior to your Discovery Debrief with a StageSHIFT VHLP Coach.

YOUR EVOLVING LEADERSHIP ASPIRATIONS

Collaborate with your StageSHIFT VHLP Coach to better explore and appreciate the key next steps in your ongoing evolutionary journey. Your Discovery Debrief will lead you into a shared inquiry, new revelations and uplifting aspirations, to inspire, ignite and expedite your vertical evolution.

Your Vertical Holistic Leadership Profile

Sample Participant 23 Jul 2021



Legend

- Your Weighted Average Rating by Dimension (AQ-SQ)
- Your Weighted Average Rating by Element
- Your Overall Weighted Average Rating (LQ)

Your Weighted Average Rating Summary

	AQ	EQ	MQ	SQ	LQ	Stage
Window Rating	.56	.57	.61	.61	.59	Catalyst - Achievist
Shadow Rating	.14	.09	.03	.07	.08	



Your Window & Shadow Dimensions

Your Current Stages in your evolving and expanding Leadership Capacity are:



On average, everyone operates along a spectrum of four stages. Two generally dominate. Your primary stage is assessed at Catalyst and your secondary stage at Achievist. The two on either side of these offer a leading edge and a trailing edge.

Here is a table of your strongest Window and Shadow elements in order of their impact.

Dimension	Window Element	Avg Rating
SQ	Perceptive	0.71
MQ	Considered	0.69
AQ	Proactive	0.67
MQ	Influential	0.66
MQ	Balanced	0.66
SQ	Energetic	0.64
AQ	Resilient	0.64
AQ	Accountable	0.63
EQ	Inclusive	0.63
EQ	Trusting	0.62
EQ	Respectful	0.62
SQ	Genuine	0.62
SQ	Courageous	0.62
MQ	Decisive	0.60
EQ	Developing	0.60
AQ	Agile	0.59
SQ	Innovative	0.46
MQ	Purposeful	0.42
EQ	Engaging	0.35
AQ	Focused	0.30

Dimension	Shadow Element	Avg Rating
<i>Offence</i>		
EQ	Unkind	0.08
SQ	Defiant	0.07
MQ	Adamant	0.07
AQ	Forceful	0.04
<i>Defence</i>		
AQ	Self-focus	0.21
EQ	Resistant	0.16
SQ	Cautious	0.12
MQ	Exacting	0.00
<i>Absence</i>		
AQ	Careless	0.16
EQ	Elusive	0.04
SQ	Compliant	0.01
MQ	Insincere	0.01

The Avg Rating of the Window elements is based on the weighted average score of the 6 capability statements at the progressive stages of vertical development (Conformist to Alchemist). The score reflects your response to each statement, i.e. Not Yet, Occasionally, Sometimes, Frequently, Mostly or Always; and, is scaled from 0 (zero) to 1. The Avg Rating of the Shadow elements is based on the 3 statements at progressive depths (Low to High).



Your Window Dimensions

Here are your Ratings for each Window element for you to review.

Stage	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist	
AQ	Doing	Performing	Instigating	Generating	Cultivating	Visionary	Avg Rating
Agile	3	4	5	3	3	1	0.59
Proactive	3	2	5	4	4	2	0.67
Accountable	4	4	5	5	3	0	0.63
Focused	4	2	2	2	1	0	0.30
Resilient	5	5	5	4	3	0	0.64
AQ Avg							0.56
EQ	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion	Avg Rating
Respectful	3	4	5	4	3	1	0.62
Developing	4	4	5	4	3	0	0.60
Inclusive	2	5	5	4	3	1	0.63
Engaging	1	2	3	3	2	0	0.35
Trusting	3	4	5	4	3	1	0.62
EQ Avg							0.57
MQ	Thinking	Planning	Interpreting	Integrating	Transcending	Wisdom	Avg Rating
Balanced	3	4	5	5	3	1	0.66
Purposeful	2	3	4	3	2	0	0.42
Considered	5	4	5	5	4	0	0.69
Decisive	5	5	2	4	3	1	0.60
Influential	5	4	5	4	3	1	0.66
MQ Avg							0.61
SQ	Creating	Designing	Innovating	Transforming	Inspiring	Wizardry	Avg Rating
Genuine	4	5	5	4	3	0	0.62
Innovative	3	4	5	3	1	0	0.46
Courageous	3	5	5	3	2	2	0.62
Energetic	4	4	5	4	3	1	0.64
Perceptive	3	4	5	4	5	1	0.71
SQ Avg							0.61
Overall							
Window Avg							0.59

The individual Ratings of the Window elements reflect your response to each statement at the 6 levels per element i.e. Not Yet (0), Occasionally (1), Sometimes (2), Frequently (3), Mostly (4) and Always (5). The Avg Rating is a weighted average score scaled from 0 (zero) to 1.

Your Shadow Dimensions

Here are your Ratings for each Shadow element for you to review.

Depth	Low	Medium	High	
AQ				
Forceful	Driven	Demanding	Domineering	Avg Rating
Offence	1	1	0	0.04
Self-focus	Self-oriented	Self-interest	Self-centred	Avg Rating
Defence	4	3	2	0.21
Careless	Inattentive	Irresponsible	Negligent	Avg Rating
Absence	2	2	2	0.16
AQ Avg				0.14
EQ				
Unkind	Negative	Critical	Arrogant	Avg Rating
Offence	0	3	0	0.08
Resistant	Unwilling	Reluctant	Rebellious	Avg Rating
Defence	2	2	2	0.16
Elusive	Evasive	Aloof	Remote	Avg Rating
Absence	1	1	0	0.04
EQ Avg				0.09
MQ				
Adamant	Obstinate	Stubborn	Autocratic	Avg Rating
Offence	3	1	0	0.07
Exacting	Insistent	Uncompromis	Perfectionist	Avg Rating
Defence	0	0	0	0.00
Insincere	Deceptive	Devious	Manipulative	Avg Rating
Absence	1	0	0	0.01
MQ Avg				0.03
SQ				
Defiant	Averse	Combative	Hostile	Avg Rating
Offence	1	2	0	0.07
Cautious	Wary	Conventional	Conservative	Avg Rating
Defence	2	2	1	0.12
Compliant	Amenable	Pleasing	Passive	Avg Rating
Absence	1	0	0	0.01
SQ Avg				0.07
Overall				
Offence Avg				0.06
Defence Avg				0.12
Absence Avg				0.06
Shadow Avg				0.08

The individual Ratings of the Shadow elements reflect your response to each statement (at the 3 levels per element) i.e. Not At All (0), Occasionally (1), Sometimes (2), Frequently (3), Mostly (4) and Always (5). The Avg Rating is a weighted average score scaled from 0 (zero) to 1.



Your Top Seven Strengths

This is a list of your top seven Window elements where you assessed yourself as Always or Mostly (5, 4), in order of stage (later to earlier) and dimension (SQ to AQ).

<i>Statement</i>	<i>Window Element</i>	<i>Stage</i>	<i>Rating</i>
I look at the system, through the system, as the system as a vehicle for transformation of self and other	SQ/ Perceptive	Constructivist/ Inspiring	5
I recognise and engage openly with important polarities to bring the picture of the whole into balance	MQ/ Considered	Constructivist/ Transcending	4
I cultivate fertile ground to increase the likelihood of new ideas and novel approaches arising in emergence	AQ/ Proactive	Constructivist/ Cultivating	4
I inspire clear strategic direction by guiding the creation of a visionary purpose and aspirational values	MQ/ Considered	Synergist/ Integrating	5
I integrate people, planet and profit to exercise corporate responsibility to realise valuable sustainable outcomes	MQ/ Balanced	Synergist/ Integrating	5
I build capability and allocate resources across the organization to realize beneficial long term outcomes	AQ/ Accountable	Synergist/ Generating	5
I ignite purposeful intent and guide personal renewal to enable everyone to bring their whole self to work	SQ/ Perceptive	Synergist/ Transforming	4

My Reflections and Revelations

What are the positive themes that come through the various elements?

How would you articulate the strengths of your leadership capacity?

Are there ways you could leverage these strengths further?



Your Top Seven Stressors

This is a list of your top seven Shadow elements in order of depth (High to Low) and dimension (SQ to AQ).

<i>Statement</i>	<i>Shadow Element</i>	<i>Depth</i>	<i>Rating</i>
I stick to what we're good at and can get done in time, and leave the rest to others as that's the best we can do	AQ/ Self-focus	Low/ Self-oriented	4
I am critical of other people and sometimes hurt their feelings as it's important to point out their mistakes	EQ/ Unkind	Medium/ Critical	3
I know my/our work isn't always the best but we're fast and others can sort out any problems that may arise	AQ/ Self-focus	Medium/ Self-interest	3
I prefer to do things my own way and stick to my point of view as others do not have the same expertise I have	MQ/ Adamant	Low/ Obstinate	3
I can be secretly rebellious as it's important to follow your own instincts and not always fill others in	EQ/ Resistant	High/ Rebellious	2
I do what's needed of me/us and then tend to tune out as others must do what's needed of them	AQ/ Self-focus	High/ Self-centred	2
I prefer not to take any risks as anything could go wrong and then I might be blamed	SQ/ Cautious	Medium/ Conventional	2

My Reflections and Revelations

What are the reactive themes that come through the various elements?

How would you articulate your shadow tendencies?

What do you suspect is the source of this shadow?



Your Top Seven Blind Spots

This is a list of your top seven Window elements where you assessed yourself as Not Yet, Occasionally or Sometimes (0, 1, 2), up to and including your current stage, in order of stage (earlier to current) and dimension (AQ to SQ).

<i>Statement</i>	<i>Window Element</i>	<i>Stage</i>	<i>Rating</i>
I am considerate and respectful, using my strengths with others to make a positive contribution to quality work	EQ/ Engaging	Specialist/ Relating	1
I share ideas and information freely with others and am interested in others' views, ideas and experiences	EQ/ Inclusive	Specialist/ Relating	2
I take pride in the quality of my work, pay attention to detail and achieve accuracy and timeliness in delivery	MQ/ Purposeful	Specialist/ Thinking	2
I set stretch goals with courage and conviction and empower others to seize advantageous opportunities	AQ/ Proactive	Achievist/ Performing	2
I drive exceptional win-win outcomes for internal and external customers, colleagues and stakeholders	AQ/ Focused	Achievist/ Performing	2
I show confidence in people and acknowledge, appreciate, recognise and celebrate strong contributions	EQ/ Engaging	Achievist/ Cooperating	2
I lead 3-year customer-centric strategies to raise the bar in providing an exceptional customer experience	AQ/ Focused	Catalyst/ Instigating	2

My Reflections and Revelations

What are the recurring blind spots that come through the various elements?

How would you articulate your blind spots as a leader?

What could you develop more conscious awareness of?



Your Top Seven Stretches

This is a list of your top seven Window elements where you assessed yourself as Not Yet, Occasionally or Sometimes (0, 1, 2), beyond your current stage, in order of stage (current to later) and dimension (AQ to SQ).

Statement	Window Element	Stage	Rating
I capitalize on market trends and new insights to inspire others and generate enhanced community wellbeing	AQ/ Focused	Synergist/ Generating	2
I invite others' conventional or novel perspectives to challenge myself to see and integrate a fuller picture	AQ/ Focused	Constructivist/ Cultivating	1
I design interventions and tailor communications to sustain the group, culture and interconnected systems	SQ/ Innovative	Constructivist/ Inspiring	1
I attune others to becoming more aware of deeper collective and/or intergenerational shadow	EQ/ Engaging	Constructivist/ Embracing	2
I am consciously aware of serving society in fruitful ways to replenish the earth and regenerate trust	MQ/ Purposeful	Constructivist/ Transcending	2
I probe into the unseen motives and ego-based drivers to develop shared meaning and deeper integrity	SQ/ Courageous	Constructivist/ Inspiring	2
I ensure that all operations have a beneficial impact on people now and in future and renew natural resources	AQ/ Accountable	Alchemist/ Visionary	0

My Reflections and Revelations

What are the development themes that come through the various elements?

Which development opportunities attract your attention the most?

In what ways would this development serve you?

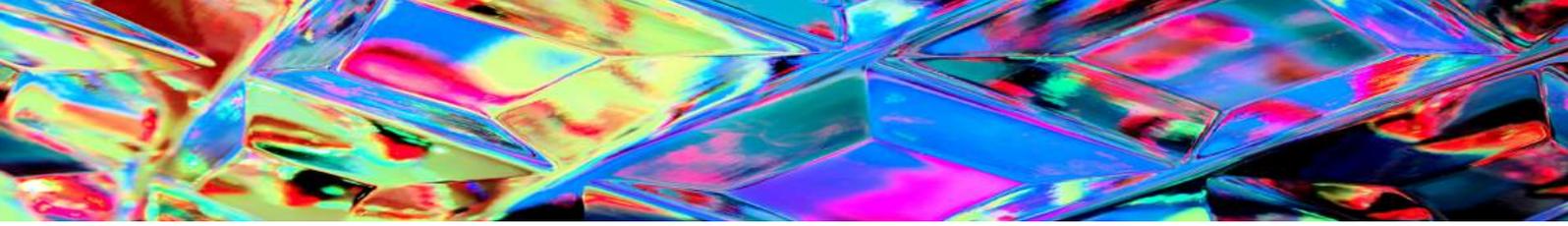


MIND MAP YOUR PREVAILING THEMES

Note the developmental trajectory from Stressors that inhibit your evolution to Stretches that expedite it.

	STRESSORS	BLIND SPOTS	STRENGTHS	STRETCHES
SQ				
MQ				
EQ				
AQ				

SPECIALIST ~ ACHIEVIST ~ CATALYST ~ SYNERGIST ~ CONSTRUCTIVIST ~ ALCHEMIST



Your Evolving Leadership Aspirations

STRENGTHS to Extend

STRESSORS to Explore

BLIND SPOTS to Express

STRETCHES to Expand

Create an Aspirational Leadership Brand Declaration to ignite and expedite your vertical development.
Use this framework: *"I am becoming a more ... (3-5 words) leader who (complete with your life purpose)."*

As you refine and embed your ALBD in your mind, it will inspire and ignite your vertical development.



STAGE & STYLE FIT WITH ROLE LEVEL & TYPE

Take a moment to compare your primary Stage and preferred Style (top Qs) with your Role Level and Role Type respectively. A 70-80% match of your Stage and Style to your Role Level and Type leaves sufficient stretch room for vertical evolution and horizontal growth. This person-role match on both elements of fit, will lead to enhanced wellbeing, optimal effectiveness, and career fulfilment.

Roles in more mature organisations can always flex to optimise and amplify the leadership capacity and evolution of its occupant. The enterprise context becomes the vehicle for personal growth.

Tier	PP	PRIMARY STAGE		ROLE LEVEL	MINDSET
METAWARE	6 th	Holist			Cosmic
		Ironist			Universal
	5 th	Alchemist	XXXL	Global Executive Leader of an Integrated Ecosystem	Transpersonal
		Constructivist	XXL	Group Executive Leader of a Global Enterprise	Transcendent
SUBTLE	4 th	Synergist	XL	Executive Leader of a Division, Region or Function	Inclusive
		Catalyst	L	Leader of a Cross-Boundary Function or Initiative	Open
	3 rd	Achievist	M	Manager of a Team or Business Unit	Growth
		Specialist	S	Self as an Individual Contributor	Fixed

Role Fit in terms of Leadership Style (Q preferences) with Role Type is more important earlier in a person's career. Initially it is important for our role to reflect our primary and secondary preferences e.g., a Creative Doer (SQ & AQ) needs to be able to take action consistently while having the flexibility to meet individual customer needs or offer innovative ideas for product or service development.

It is also essential that the primary requirements of a role e.g., accuracy in reporting and meeting deadlines (MQ & AQ) are congruent with a person's preferences. We will always undertake our preferred type of work and have blind spots regarding the work we do not naturally tune into. As we shift to Catalyst, we naturally broaden our Leadership Style to integrate the other Qs at mature Synergist.

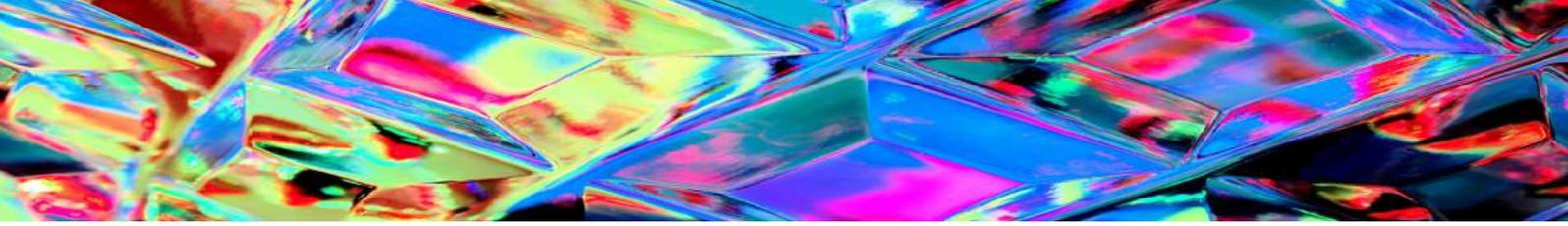
YOUR CENTRE OF GRAVITY

To check if your Centre of Gravity, your default automated operating system, is at Achievist or Synergist, the most common dilemma given our prevailing spectrum of stages today, consider the following:

When anchored at Achievist, we work within the context of our organisation, customers, suppliers and community stakeholders. We negotiate or navigate the terrain we find ourselves in to realise the best outcomes available. The standards, boundaries, priorities and norms set by the context contain and shape our decisions and actions. We do the best we can to meet the needs and goals of every situation.

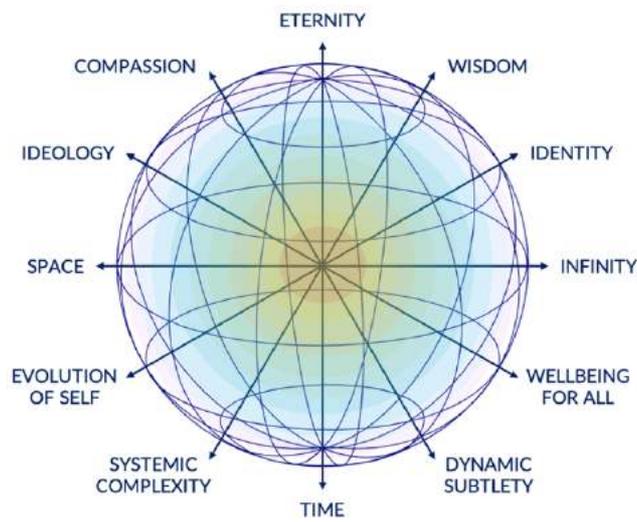
When anchored at Synergist, we shape, re-engineer, and transform our context. Because we are now self-validating, we reset the standards, boundaries, priorities, and norms for everyone we lead and encounter. We model more principled and purposeful cultural memes that others appreciate and respect us for. Our decisions and actions are designed to generate eco-centric mutually beneficial outcomes that serve society over the longer term. We uplift the culture and co-create new ways of collaborating.

To what extent do you navigate your work context or actively reshape it to realise longer term outcomes?



PART III

SPECTRUM StageSHIFTS



Stage SHIFT Sphere



SHIFTING THROUGH THE STAGES

The Tiers (O’Fallon) disclose the objects that are discernible at those stages of development. Early in our development, the world is largely Concrete e.g., our house, school, clothes, our stuff. In the Subtle Tier, we work with intangible and abstract concepts such as models, frameworks, perspectives and experiences. Meta-consciousness rather than rational thought prevails in the MetAware Tier. At these stages we surrender our ego to become instruments of cosmic evolution guided to realise new solutions.

Tier	PP	SHIFT IN	Mode	Values	Intentions	Logic	Attention	Leadership
METAWARE	6 th	Holist	Joy	Eternity	Cosmos	Cosmic	Light	Holistic
		<i>Ironist</i>	<i>Love</i>	<i>Boundless</i>	<i>Universality</i>	<i>Blissful</i>	<i>Wonder</i>	<i>Quixotic</i>
	5 th	Alchemist	Free	Spiritual	Aspirations	Transcend	Ecosystem	Social Evolution
		<i>Constructivist</i>	<i>Care</i>	<i>Reverence</i>	<i>Evolution</i>	<i>Metasystem</i>	<i>Transpersonal</i>	<i>Intersystemic</i>
SUBTLE	4 th	Synergist	Calm	Openness	Purpose	Systemic	Collaboration	Quantum
		<i>Catalyst</i>	<i>Flow</i>	<i>Respectful</i>	<i>Values</i>	<i>Resonance</i>	<i>Engagement</i>	<i>Authentic</i>
	3 rd	Achievist	Grow	Efficiency	Goals	System	Performance	Transformational
		<i>Specialist</i>	<i>Play</i>	<i>Quality</i>	<i>Skills</i>	<i>Analytical</i>	<i>Improvement</i>	<i>Expert</i>
CONCRETE	2 nd	Conformist	Work	Followship	Tasks	<i>Linear</i>	Authority	Authority
		<i>Rule-based</i>	<i>Try</i>	<i>Belonging</i>	<i>Rules</i>	<i>Rules</i>	<i>Belonging</i>	<i>Family</i>
	1 st	Opportunist	Fear	Playing	Taking	Sovereign	Security	Child
		<i>Impulsivist</i>	<i>Need</i>	<i>Held & Fed</i>	<i>Receiving</i>	<i>Needs</i>	<i>Safety</i>	<i>Mother</i>

PERSON PERSPECTIVES

The journey through the Person Perspectives (PP) can be simplified to reflect the use of “persons” in grammar. We begin with the 1st PP as “I” or “me”. We are the centre of our existence. We then shift to 2nd PP, “You”. We attend to the authority of our elders, our parents, teachers and other officials. Then we shift to 3rd PP or “It”. Our focus is on the material world, performance, profits and objective outcomes.

The current shift to the 4th PP takes us to “We”, 1st person plural. It becomes important to attend to the needs, goals, desires and aspirations of all of us over the medium to long term. The 5th PP is “You”, 2nd person plural. We have the vantage point of the MetAware Tier to view everyone and the planet as “You”. The 6th PP is 3rd person plural, we identify with all of “It”, the solar system, cosmos, universe.

INTENTION & ATTENTION

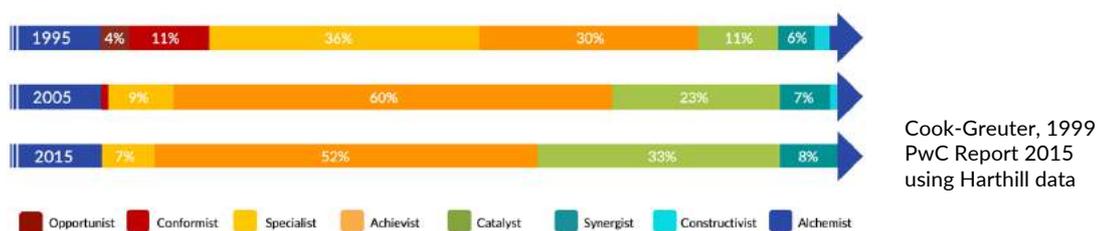
At each stage there is a shift in what we value most, what we wish for, how we think, what we attend to and how we exercise leadership. Our sphere of awareness, interpretation and understanding grows to progressively comprehend increasing complexity due to our familiarity with multiple interconnected complex adaptive systems. We appreciate greater intricate subtlety due to our deeper understanding of intergenerational psychodynamics and embrace our vulnerability to uphold a more inspiring ideology based on universal principles and the inherent goodness of humanity and peacefulness for the world.



THE PACE OF LATER STAGE DEVELOPMENT

Research indicates that Synergist leaders are the type of leaders we need in the world today. Only at this level are leaders able to cut through complexity, transcend uncertainty and hold the strategic clarity to recreate an ecosystemic organisation where everyone can innovate and collaborate, thrive and flourish. They have the power to lead the generation of more sustainable, healthy, and equitable outcomes.

Research indicates that less than 10% of executives are currently assessed at Synergist. Further, the proportion of Synergists has only been growing at a snail's pace of 1% per decade. While the proportion of competitive Achievists has begun to diminish and the proportion of engaging Catalysts has grown by 11% per decade, executives at this level are still only able to navigate the system rather than shape it.



Previously it was understood to take around five years for senior executives to realise later stage development due to the lack of leaders modelling this leadership capacity. However, a study of 335 executives (avg age 40) in a 25-day enriched Community Leadership Program found that 27% shifted one stage to the later stages of Catalyst or Synergist in one year (Vincent, 2015). Further, all executives attending Vertical Integral Leadership Programs shift 1-2 stages over 1-2 years (Brown, 2014).

StageSHIFT found that the participants in its research study, mostly starting out at Achievist, also all shifted 1-2 stages in one year. 80% of participants shifted a single stage to Catalyst, and 20% shifted two stages to Synergist, after just eight 90-min coaching sessions in one year. StageSHIFT Coaching offers a 120% StageSHIFT ROI, four times that documented above, in a total of two days instead of 20.

StageSHIFT Coaching is 4 times more effective in expediting later stage development to mature Synergist, a 120% ROI, in just 10% of the time generally invested in intensive leadership programs: 2-Days pa instead of 20.

We conclude that conventional leadership programs have proven to be insufficient to generate Synergist leadership capacity due to the following key factors.

1. They are not sufficiently aspirational in their intent, nor do they resolve and heal shadow.
2. Conventional Developmental Coaching is limited by the coachee's current vertical perspective.
3. Leadership development is separated from rather than integrated with enterprise evolution.
4. Intensive leadership development programs take place offsite rather than inviting an onsite shift.

These limitations are explicitly relevant to the purposive development of Synergist leadership capacity as it is their resolution of shadow that facilitates inner clarity and peace of mind, while their applied capacity to lead the transformation of their ecosystem activates this more expansive inner awareness.



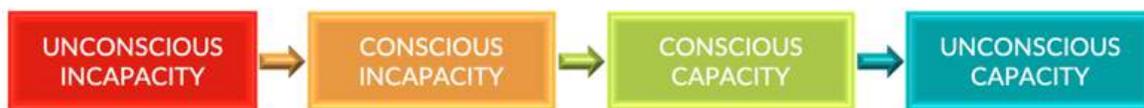
SHIFTING OUR Centre of Gravity (CoG)

The key StageSHIFTS needed today are from a Centre of Gravity (CoG) at Achievist to Synergist, and from a CoG at Synergist to Alchemist. We need more Synergists to purposefully lead enterprises and regions, divisions and functions in organisations, and Alchemists to forge and lead global ecosystems.

Most Stage Spectrums incorporate four stages: a primary stage, secondary stage, a leading edge and a trailing edge. Sometimes more or fewer are present relative to our current evolution and degree of integration. Our CoG is found in our primary or secondary stage, whichever is in an integrated stage.

Curiously, when we evolve, it's not our Centre of Gravity that shifts first. It remains strong and stable. It is the pivot point around which we lean into our next individuation stage and heal the shadow from preceding stages. We gradually gather momentum by leaning into our new perspective and releasing past limiting beliefs and emotional wounds, to finally tip our CoG into the next integrated stage.

It's similar to the shifts in developing competence. First, there's a realisation that there is something new to become aware of and understand to enhance our leadership competence. With the support and guidance of a later stage Executive Coach, we develop Conscious Leadership Capacity by investing significantly in developing our leading edge while healing and integrating shadow at earlier stages. As our conscious development becomes increasingly embodied and automated, we gradually consolidate this new Person Perspective in the second integration step with Unconscious Capacity at our new CoG.

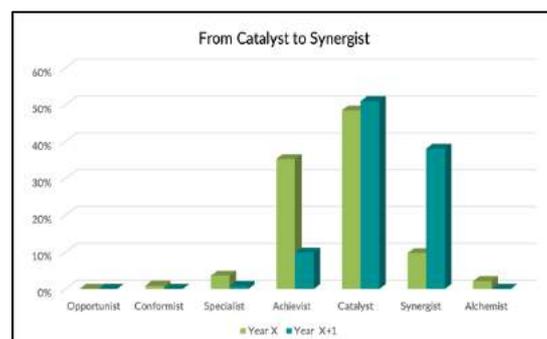
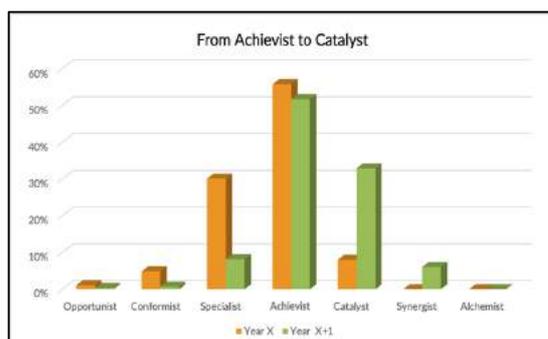


FROM ACHIEVIST TO SYNERGIST

The Stage Spectrum at Achievist incorporates stages from amongst Conformist, Specialist, Achievist, Catalyst and Synergist, like a travelling normal distribution curve. As you can see from the graphs below, the Achievist profile in orange begins with a secondary stage at Specialist and a leading edge at Catalyst.

After a year's vertical development, their profile at Catalyst has strengthened while their Specialist profile reduced by an equivalent amount. However, their COG remains at Achievist. While their 4th Person Perspective has developed considerably in terms of awareness, and they even have a new leading edge at Synergist, their active self-expression and leadership effectiveness remains anchored at Achievist.

It is not until their new 4th Person Perspective is activated and gradually becomes embodied that their secondary stage in their profile shifts sufficiently to Synergist to become their new CoG. At this point, their reliance on their Achievist mindset has been superseded to become their new trailing edge.



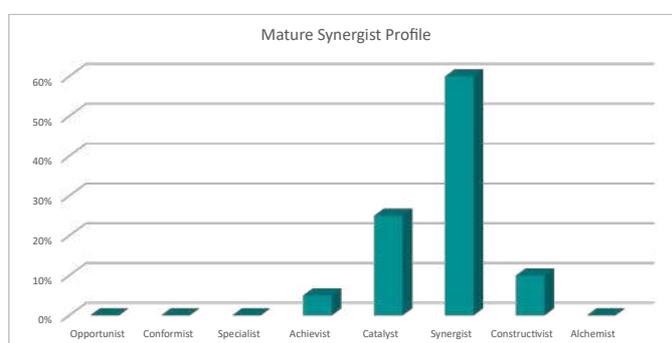


From a holistic view, as the heart opens at Achievist to not only follow our heart's desires but to embrace and genuinely respect all others, we connect with the 4th Person Perspective at Catalyst. Our inner world opens up to include the disparate selves within, our shadow, and our outer world opens up to appreciate diversity and explore the psychodynamics of relationships as we engage more widely across boundaries.

Intuition comes alive to foster our insight and inquiry, and the heart is invited to heal emotional wounds while the mind reframes limiting beliefs, to expand our integrated leadership presence at Synergist. This vertical development is the Hero's Journey of shadow crashes, reactive patterns, dramas and dilemmas.

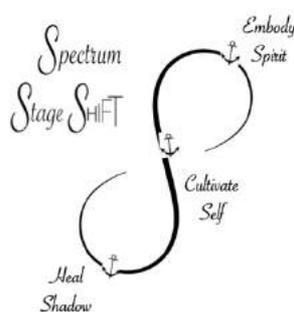
From a strategic perspective, the locus of control shifts from negotiating the surrounding context, to navigating our inner world of intrinsic purpose, universal principles and conscious evolution to ultimately lead inter-systemic transformation without invitation or permission. Our newfound integrity demands it.

The mature Synergist has their primary stage at Synergist, and their secondary at Catalyst, their leading edge at Constructivist and their trailing edge at Achievist. This profile tipping into the MetAware Tier equips the mature Synergist with the advantage of seeing projections and transference in the moment rather than in reflection. They are therefore able to consistently hold the psychologically safe space that others can rely on.



FROM SYNERGIST TO ALCHEMIST

The spectrum of stages reflecting a CoG at Alchemist includes Synergist, Constructivist, Alchemist, Ironist and Holist, to varying degrees. There is a Square Dance to a primary Individual orientation now able to operate on the Synergist's Collective. Just as the Achievist learnt how to win the game of life for self in the Conformist collective, the Alchemist sets the scene to create victory for society as a whole.



From a holistic perspective, the shift to these later stages involves three interconnected strategies: to cultivate Self, embody Spirit and heal Shadow. In the shift to Synergist, we focus on the personal Self, Spirit and Shadow. In the shift to Alchemist, the field widens to include the deeper collective, cultural and ancestral Self, Spirit and Shadow.

While the evolution to a mature 4th Person Perspective at Synergist can be correlated with an adventurous journey across mountains and valleys i.e., the Hero's Journey, the evolution to a mature 5th Person Perspective approximates a voyage to the bottom of the sea and back.

It involves an immersion in MetAwareness where we become suspended and then surrendered. The route to a more vibrant sense of lightness involves a type of soul sabbatical as we shift our source of identity from ego to soul, and release personal will to partner with the universe in cosmic evolution.

The quantum shift in the strategic leadership capacity from Synergist to Alchemist is essentially a shift from leading, holding and sustaining the intersystemic context at Synergist to optimise all stakeholder outcomes, to redesigning and re-engineering the ecosystemic context at Alchemist to realise evolutionary developmental propulsion, the source of more extraordinary social and economic outcomes.



The StageSHIFT KEYS WITHIN 'SHIFT'

StageSHIFT has been explicitly focused on coaching senior strategic executive leaders and enterprises to later stages for more than ten years. We have taken an innovative collaborative integrated approach that has proven to be highly effective and extremely efficient. The Vertical StageSHIFT involves:

- Strategic Enterprise Evolution integrated with Vertical Leadership Development
- Holistic Identity of the Self based on the four Dimensions of Vertical Development
- Inspiring Cultivation of the Self, Embodying Spirit and Healing Shadow from within
- Force of Nature organically Expanding our multifaceted Sphere of Evolution, and
- Transformative Coaching focused on Expansive Dialogical Meaning-Making.

STRATEGIC ENTERPRISE EVOLUTION



One of the secrets of StageSHIFT Coaching is that it begins with creating the structural Strategic Scaffolding to expand the space for Vertical Leadership Growth across all levels of the organisation. This refers to the 4th Quadrant of Structure in Wilber's Integral AQAL Model, All Quadrants All Levels, the Exterior of the Collective, the context within which culture emerges.

By transcending and adding Strategic Scaffolding to the structural context rather than simply navigating it, the emerging Synergist awareness is activated and becomes embodied. It is this transforming leadership capacity that is the trademark of a Synergist.

HOLISTIC LEADERSHIP EVOLUTION

Much of Vertical Development has a cognitive bias. The WUSCT-based assessments and the nature of subject/object inquiry rely on the testimony offered by the words of our self-expression, the way we share our mental perspective or worldview. StageSHIFT is unapologetically holistic in its approach to self and leadership development. The four lines of conative, affective, cognitive and inventive capacity form the Holistic components of the StageSHIFT Vertical Holistic Leadership Model (VHLM).

Conative intelligence reflects purposeful doing, our Action Orientation (AQ). Affective intelligence focuses on how we relate to others, our Emotional Awareness (EQ). Cognitive intelligence to our thinking, to what we give our Mindful Attention (MQ). And our inventive intelligence nurtures our creativity and Spiritual Congruence (SQ). Together, they form our Holistic Leadership Presence (LQ).

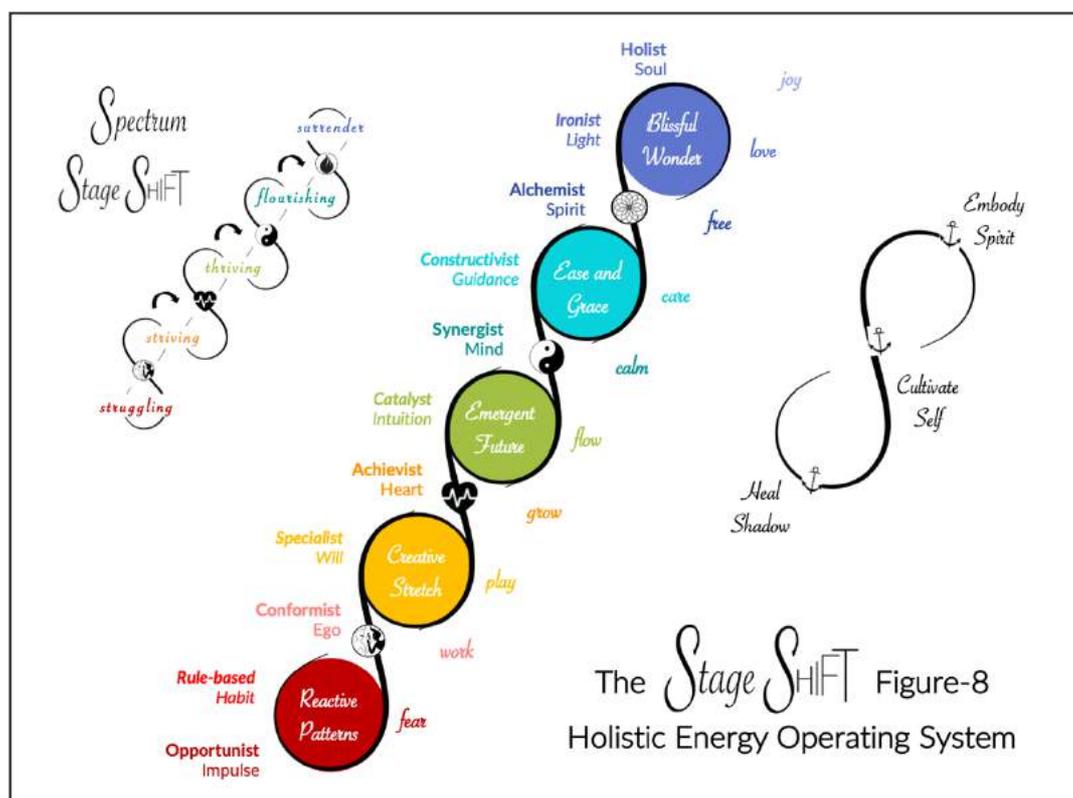
LQ	Leadership Presence	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist
AQ	Action Orientation	Doing	Performing	Instigating	Generating	Cultivating	Visionary
EQ	Emotional Awareness	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion
MQ	Mindful Attention	Thinking	Planning	Interpreting	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



INSPIRING SELF EVOLUTION

The Spectrum StageSHIFT is a new approach to vertical development. Instead of seeing it as a stage-by-stage linear process, it's more realistic to view it as a Spectrum StageSHIFT from one Centre of Gravity (CoG) in the second step of integration to the next, two stages beyond. It's impossible to anchor in an individuation stage, the first step in each transformation to a new Person Perspective. During individuation, we are just beginning to familiarise ourselves with a new language, a new terrain, a new way of being. Only during the second step of integration can we autonomously activate that new potential of awareness and become significantly more effective as leaders.

By setting up our new CoG with aspirational intentions to embody spirit, we create a “pull” effect to attract new challenges and opportunities along with new resources and people to help us on our way. We lean into our leading edge, or secondary stage if it is beyond our primary stage, to progressively embody our higher self. Our spirit starts out as our aspirational self and continues to inspire our vertical development as we evolve to Alchemist when our free spirit becomes our new Centre of Gravity.



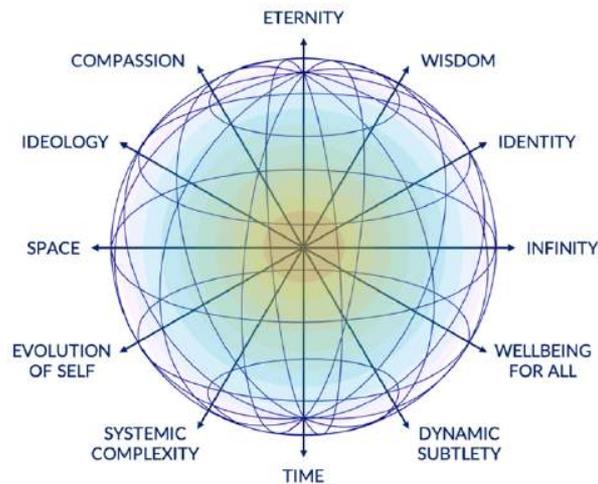
We cultivate our present self by expanding our conscious awareness and paying attention to our self-expression in order to demonstrate kindness, mindfulness and congruence. By cultivating our integrity, we become more authentic, courageous and trustworthy. We gradually broaden our leadership capacity and enhance our personal wellbeing and the positive ripple effect we have on life and others.

By exploring the psychodynamics of reactive intrapersonal and interpersonal situations, we learn to appreciate and heal our shadow. By taking Emotional Awareness to the level of healing shadow, a significant step change from developmental to transformative coaching, we release the past and eliminate recurring reactive patterns and themes. Over time, as we integrate our disparate selves, the voices in our heads also disappear and our mind arrives at a continuing state of calm, clear mindful attention at Synergist, like a clear blue sky.



EVOLUTION IS A FORCE OF NATURE

We were born to evolve. As we expand our identity through the evolution of self, our ideology evolves to embrace wellbeing for all. Through our understanding of systemic complexity, we develop wisdom. Through our appreciation of psychodynamic subtlety, we develop compassion. Gradually time and space become timeless and boundless at eternity and infinity. We become all that we can be in the evolution and dissolution of self. This involves letting in and letting go, seeing and healing all of other within self.



Stage SHIFT Sphere

TRANSFORMATIVE COACHING EVOLUTION

Transformative coaching is the next generation of coaching (Stelter). It is distinguished by:

- A focus on meaning-making in relation to the purpose of every life experience we encounter.
- A dialogical partnership whereby the coach openly shares their insights, asks leading questions, and invites the coachee to experiment with explicit perspectives, approaches, and frameworks.
- Re-engineering the structure of the complex adaptive system beyond navigating its dynamics.

This is a powerful form of coaching if your coach is at a later stage of Synergist/Alchemist, beyond your own evolution. They will be able to stretch your mind, open your heart and lift your spirit to consider larger and deeper perspectives that will elevate your leadership capacity and evolve your organisation.

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



StageSHIFT PHILOSOPHY, PRACTICES & TIPS

From a 3rd person perspective, Life is a Movie. It is a projection of the conscious mind. We do this with plans, goals, wishes, desires and more powerfully at later stages with our imagination, visualisation, intentions and aspirations, followed by inspired action. The key mantra is: 'If it is to be, it is up to me'. Activating evolutionary aspirational mindful intention facilitates 'Living the Dream'.

From a 4th person perspective, Life is a Mirror. It is a reflection of the subconscious mind. We discover our inner psyche through events that happen in our life experience and how we are triggered, react and transfer inner preoccupations onto others. By 'Loving the Drama' we can learn so much about ourselves and resolve the past, heal the residual pain, integrate our disparate selves and evolve to become whole.

From a 5th person perspective, Life is a-Mazing. It is a connection with the cosmic mind. We realise that we are a microcosm of the macrocosm and that our lifetime and soul evolution is fully interconnected with cosmic evolution. Just as the universe serves us, we serve the universe and 'Learn to Dance' to realise and renew the emptiness and fullness of life experience.

From a 6th person perspective, Life is a Mystery. We are an inception of the universal mind and the universal mind is an inception within us. We are not just a drop in the ocean but also the ocean itself within the drop as the two are inextricably one and the same being, crashing on the shore as roaring waves, rippling as white crests, yielding as smooth silk and sinking as murky depths, to 'Lead the Dharma'.

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

To expand your sphere of consciousness, reflect on your thoughts, feelings, decisions and actions by

- Disciplining your mind to hold positive thoughts and open questions
- Deepening your emotional awareness and sincere expression of feelings, and
- Undertaking journaling to uncover your recent projections and introjections.

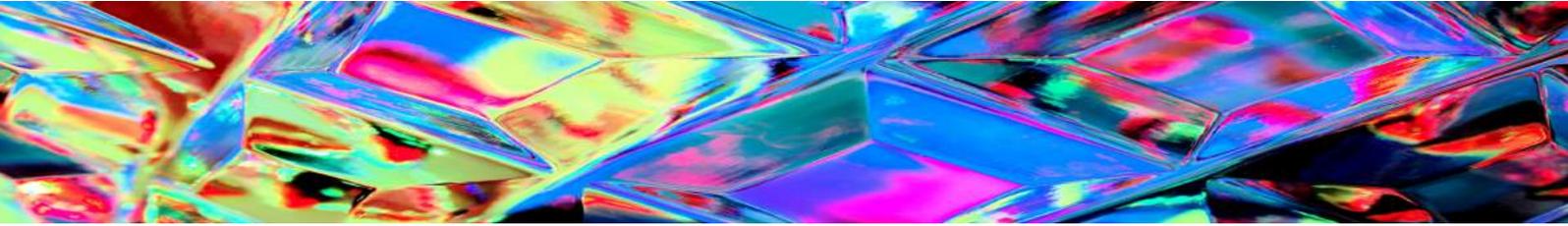
It is also useful to explore any personal triggers, criticism and judgments of others

- Catalysts see that others project on them, that it is not always about them
- Synergists see their projections on others on reflection, realising it is about them
- Constructivists see their projections instantly and confess and reframe immediately.

While it is useful to appreciate which stage or perspective you are expressing yourself from when reviewing situations, it is very valuable to your evolution to consider:

- What is coming to mind and why? How is it meant to help or guide me?
- What is important for me to discover here? What do I want to understand more deeply?
- How do I really feel about this situation? What or who has been dishonoured?
- What is my best decision in this situation? One that honours everyone and everything.

Your inquiry in and of itself into every life experience, minor or significant, will generate the answers and insights you need to better understand and direct your life's journey. Assume that everything that is happening in your life experience is custom designed for your own vertical evolution in consciousness.



SHIFT to SPECIALIST

1. Develop specialist knowledge and skills in a field of study or practice that appeals to you
2. Devote yourself to becoming better and better at what you do
3. Consider how you may be able to improve the processes through which work is done
4. Realise that your best work is always good enough exactly as it is
5. Separate feedback on your work from feedback on how you are as a person
6. Understand that while your work is evolving, you are too in self-discipline
7. Set up a consistent set of habits that enable you do your best work consistently
8. Know that you are a masterpiece-in-progress and that kindness is always rewarded

SHIFT to ACHIEVIST

1. See more of the positive in everything instead of the negative
2. Focus on creating value for others, colleagues and customers
3. Set priorities and learn to say "No" judiciously and graciously
4. Actively invest in working more cooperatively with others
5. Experiment by taking new initiatives to improve the system
6. Let go of your personal inner critic and use an affirmation to override it
7. Focus on fit for purpose for the end-user rather than technical perfection
8. Observe your reactive egoic patterns and take steps to understand their source.

SHIFT to CATALYST

1. Exercise courage to live up to your own higher values and ethics
2. Bring more understanding to your relationships with others
3. Engage with diverse stakeholders to become aware of their needs
4. Set clear explicit intentions to realize your highest aspirations
5. Tune into your intuition and listen within to discover the best way
6. Diagnose, resolve and heal iterative reactive emotional patterns
7. Involve yourself in shadow work to eliminate emotional triggers
8. Be kind to yourself and others each day as you navigate uncertainty.

SHIFT to SYNERGIST

1. Live with integrity based on universal principles e.g., justice and freedom
2. Demonstrate high mutual standards when addressing and engaging others
3. Set, manage and navigate personal and shared boundaries scrupulously
4. Advocate on behalf of multiple diverse stakeholders to build shared momentum
5. Focus on generating more sustainable, synergistic community outcomes
6. Explore and resolve the subtle power dynamics at play within yourself
7. Redesign the systemic context to liberate potential and realise aspirations
8. Mentor and coach others in relation to important standards and principles.

SHIFT to CONSTRUCTIVIST

1. Surrender to cosmic evolution in its own time with grace and patience
2. Care reverently for all of life including yourself with great compassion
3. Shift to a sense of boundlessness by being fully present in every moment
4. In silence and stillness, see and reflect on the harmony in the light and the dark
5. Consider the evolution of civilisations by looking into the rise and fall of eras
6. Surrender your will to trust that all needs will be met by the universe or source
7. Reconstruct and reframe your self-expression in the moment to clarify meaning
8. Become duty, doubt and debt free to embody guidance with ease and grace.

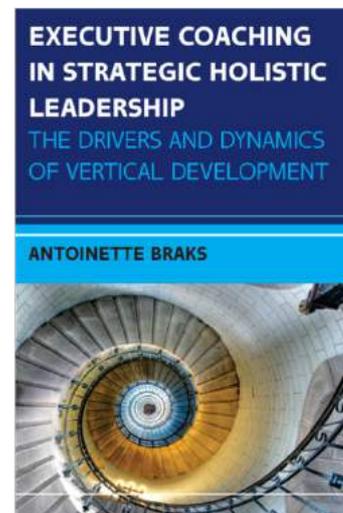
SHIFT to ALCHEMIST

1. Become inspired by all that you do to create a new and better world for all
2. Live by simple, universal, sustainable systemic, equitable, healthy principles
3. Take mindful action with great care for introducing even the possibility of harm
4. Invite and allow ideas and insights to flow through into your consciousness
5. Create new integrative models and concepts that interconnect multiple ideas
6. Set a socio-economic context for your regenerative talents to manifest renewal
7. Interweave across intersystemic contexts to plant new seeds of inspiration
8. Bring light and love to all beings sharing your joy and delight in humanity.



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You can download these articles on Vertical Evolution, Transformative Coaching and Leadership Development from the StageSHIFT website.

You can also select a StageSHIFT coach on our website to set up and gain enormous value from a one-on-one Discovery Debrief. They all have a deeper and broader consciousness of self and life at Synergist and beyond, and therefore offer a highly expansive mindset to stimulate your evolution.

Engage with your StageSHIFT coach or, if you are new to StageSHIFT, connect with Dr Antoinette Braks to discover how we can help you and your organisation to rise above the turbulence and flourish by elevating your purpose and culture, and liberating your people to be of service to more effectively contribute to the co-creation of a more sustainable, healthy, equitable, kinder and joyful world for all.

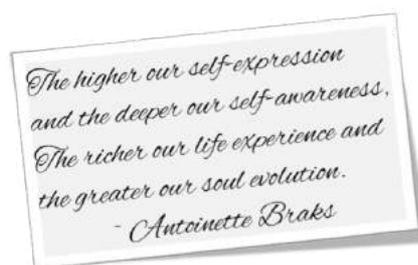
Warmest wishes and wonderings,

Dr. Antoinette J Braks PHD MBA.LBS

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APPENDIX

Strengths and Shadows Through the Stages

Excerpts from Dr AJ Braks, Executive Coaching in Strategic Holistic Leadership, Ch 2 (2020)

Stage Shift	work	play	grow	flow	calm	care	free	love	joy
									
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

Illustrations by Rudiestrummer@dreamstime



SPECIALIST @ play

The *Specialist* is a novice. They embark on their individual development emerging from the rules-based, authoritarian Collective of the *Conformist*. They experience the desire to develop their own independent identity and role in life beyond the group or groups to which they belong. It can be quite a disorienting period, as much of everything that is now perceived is new, intangible, and barely distinguishable.

Needs/Values

At this stage, the *Specialist* develops their own craft or expertise, often working with lots of data and detail, techniques and processes to gain a better understanding of how things work. The focus is on developing excellence in their domain of interest. Many *Specialists* are in specialist, technical, and functional roles.

Strengths

The *Specialist* develops a third person perspective that enables them to observe others in transactional relationships with each other, as well as look at information objectively and critically. While a second person perspective can stand alongside another person and explain what they might do in their situation, a third person perspective enables a person to look objectively at a situation and view multiple options for decision-making in a rational way.

They are able to argue their own position, sometimes in oppositional fashion dismissing others' views and concerns. The *Specialist* prides themselves on being 'right', having the last word and standing out from others. They seek and enjoy recognition from highly respected subject matter experts for their individual talents and accomplishments, and no longer gain as much satisfaction from the approval of those in authority. They want to be seen and respected for their differences and special talents that set them apart rather than for what they have in common with others.

Shadow

Specialists taken to extreme can become argumentative, opinionated, and oppositional. 'Yes, but' is a common phrase used by *Specialists*. They can show contempt for the views of those perceived to be less expert and may even ridicule them to feel 'better than'. This can lead to a distancing from others and arrogance. Logic rules. They hold high ethical and moral standards in relation to rules and responsibilities, and will label non-compliant behaviours as simply 'wrong'.

However, when their work or behaviour fails to meet their own exacting standards, they are just as critical of themselves. The universal shadow of being 'not good enough' is found here. It is a psychological response related to the fact that the *Specialist* identifies with their work. If their work falls short, they feel that they are personally falling short.

Executive Prototype

In an organisational setting, the *Specialist's* focus on continuous improvement and finding alternative solutions is an asset in relation to the enhancement of standard business operating processes. Their logical presentation based on scientifically rigorous evidence enables them to gain consensus and win approval for business proposals.



ACHIEVIST @ grow



The *Achievist* represents the final stage in the conventional world. It is a consolidation mode where the person feels comfortable, a sense of having arrived and pride in having developed a certain mastery of life. In O'Fallon's Tier model, the *Achievist* moves into the Active modality within the Subtle Tier still focused largely on themselves as an individual contributor, team, or divisional or organisational leader.

Regardless of their relationships and responsibilities, their view of the world is largely still constituted by 'me' and my team, division, business, or organisation. This stage of development is their opportunity to find out what they can achieve in the world. From Kegan's (1982) perspective, the *Achievist* is Self-Authoring for the first time. They feel confident setting goals, making decisions, and directing others.

Needs/Values

The *Achievist* sets specific goals and strives to achieve the results they want. Time horizons open up for them into the future in that they are able to set goals three to five years hence and create a specific step-by-step action plan as to how those goals will be achieved. Their mature third person perspective enables them to prioritise both goals and activities, and create feedback loops by way of milestones, deadlines, and key performance indicators that enable them to measure and monitor performance over time.

Strengths

Achievists work incredibly hard to achieve their goals. Their developing ability to set goals, make plans, focus attention, juggle priorities, create strategies, implement initiatives, take risks, and monitor progress enables many *Achievists* to become high performers in their industry. The *Achievist* can manage the downside of things going wrong, resolve problems as they arise, and anticipate rival activities that might threaten their own success. This enables them to become effective and efficient competitors. The *Achievist* competes side by side with others to win market share. They are happy to play win-lose. 'When the going gets tough, the tough get going' is an apt representation of the *Achievist*.

Shadow

The *Achievist* is driven to succeed and gives everything they have to their work. Their identification with the results they achieve and the fact that there are more targets next week, next month, and next year sets them on a trajectory of enterprise, creativity, and ongoing compulsion to achieve and do more. They can easily become bound up into being continuously and frantically busy on the treadmill of work and become a workaholic. This form of addiction is very typical of the *Achievist*. 'More' shouts loud and clear.

Executive Prototype

They are very happy to work with others and their team members, and they can lead divisions and organisations extremely effectively and efficiently although not always ethically. *Achievists* focus on creating a positive atmosphere contrasting a positive outlook with the 'not good enough' worldview of the *Specialist* and leveraging people's strengths with a keen eye on deliverables and results.



CATALYST in flow

The *Catalyst* is the first post-conventional individuation stage and represents a leap into a new growth zone and another unfamiliar world. The *Catalyst* is focused on understanding their inner world: their thoughts and feelings, motives and fears, reactions and responses, and their deepest desires and aspirations in relationship with others. By exploring their inner world, and inquiring into others' experiences and perceptions, they become more intuitive and understanding, more insightful and purposeful. *Catalysts* ask existential questions: 'Why?', 'Who am I?', and 'What is the meaning of life?'



Needs/Values

The *Catalyst* is no longer driven by deficiency needs but by growth needs. A person at *Catalyst* moves into their personal growth zone where growing and evolving becomes their natural way of being. Even though the challenges they encounter along the way may be unfamiliar and disconcerting, for the participant, life is forever enriched.

A person shifts from being satisfied with a life based on cause and effect to feeling their way forward in the world despite uncertainty and adversity in order to lead a more purposeful and fulfilling life based on conscious intention, committed action, and ethical considerations. The implications of commercial results are considered more broadly beyond shareholder returns in terms of their impact on health and wellbeing, environmental sustainability, social impact, and community interests.

Strengths

Awareness is a key word for the *Catalyst*, as is respect: both self-respect and respect for others. This is a key shift from implementing the transactional means to achieve specific ends to ensuring that the means employed are mutually respectful and appreciative of others, regardless of their capabilities. Their attention extends from 'what', to 'how' and 'why'. Their focus expands from forward to inward. In their view, everyone is entitled to a voice, and they realise that collaboration – thinking together, learning together, exploring together, and then deciding together – is essential to generate new solutions.

Shadow

The shadow of the *Catalyst* is in their uncertainty and confusion. They can still adopt the forward propulsion of the *Achievist*, but they are becoming much more mindful of 'how' work is accomplished rather than driving for results. At this first post-conventional stage they break out of the conventional capitalist model of the world and seek to develop personal alignment with values that they are only beginning to understand the impact and implications of.

Executive Prototype

This makes a *Catalyst* more of an inquirer and facilitator, rather than a manager. They will now be bored as project managers yet adept as change leaders but not yet ready to become divisional, organisational, industry or socially transformative leaders. At early *Catalyst* they are very self-preoccupied and then gradually lean into cross-boundary engagement processes and cross-sector discovery projects rather than typical results-oriented workplace assignments. *Catalysts* enjoy bringing about change as change leaders – in contrast to change managers who model *Achievists*. *Catalysts* are focused on genuinely engaging others, getting and using their input, igniting change, and working across boundaries.



SYNERGIST @ calm

The *Synergist* consolidates their journey through the Subtle Tier. They integrate their identity at the new inter-systemic, interpenetrative collective and are now able to transcend and transform the previous Concrete collective. This is a significant culmination of deep personal work in relation to cultivating their identity and integrity. They have developed an expanded capacity to integrate the broader organisational and industry context they are surrounded by and yet an integral part of.

Needs/Values

The *Synergist* is defined by their capacity to engage more collaboratively, think more systemically, demonstrate more curiosity in relation to other people's viewpoints, actively step in to resolve conflict more readily, and look into situations with greater insight and discernment. They show a genuine interest in developing others and capitalising on the interconnections across situations, regions, and cultures.

Causation is recognised as circular, relational, and systemic. The interpenetrative nature of life is perceived through projections, transference, and psychodynamics. The Subtle Interpenetrative realisation is that people share a common humanity, the same breadth and depth of emotions, dreams, hopes, and fears within, that make us a single human community.



Strengths

At this point in their journey of increasing expanding consciousness, Synergists have become self-aware and other-aware and have the ability to be discerning and self-validating. They do not seek approval or permission from others. They have developed strength of character and their integrity is evident. *Synergists* have the vision, conviction, and presence to generate and sustain transformative change by standing up for what they believe in and articulating their perspective graciously and wisely.

Shadow

The shadow of the *Synergist* reflects their expanding leadership capacity. While they can be seen to demonstrate a shared humanity and embrace diversity, they are not yet renowned for their humility. That doesn't emerge until a leader embarks on their voyage into the MetAware Tier. Instead, they have a tendency towards being directive and even arrogant as they bring people together. Their generosity can dissipate when they become exasperated by their own impatience with others as they learn to develop the patience of timelessness.

Executive Prototype

The collective perspective is fully manifested at *Synergist* when the leader acts to transform the previous conventional collective based on rules and authority to a post-conventional collective based on shared eco-centric values, respect for personal autonomy, equity and diversity, and the intention and capacity to re-engineer the collective to organically generate greater community wellbeing and shared prosperity.

When led by a *Synergist*, the organisation shifts from being customer-centric to community-centric, that is, eco-centric. It succeeds in achieving medium- to long-term sustainable outcomes that make a real, significant, and beneficial impact on the people they serve and affect now and in future generations.



CONSTRUCTIVIST @ care

The next stage is another quantum shift of all three parameters into a new Tier, a Tier that is unknown to 99% of people today. The MetAware Tier is awareness of awareness, a metacognition that begins to identify with source, or cosmic energy forces. The first stage in this tier is of course an individual receptive stage where a person once again encounters an entirely new world of energy dynamics and perceptible dimensions of reality.

Needs/Values

This stage encounters the loss of identity and surrender of self. After investing significant time, energy, and commitment to defining and understanding self and other, the step into MetAware is to step into the void of emptiness and fullness, where nothing is and all is possible.

While the journey through *Catalyst* and *Synergist* can be compared to the archetypal Hero's Journey, the transition through *Constructivist* and *Alchemist* is akin to a voyage to the bottom of the sea. There is a sense of immersion in a wholeness that cannot yet be understood or fathomed.

Strengths

There is a new perception of time and space, or spacetime evolves as being boundaryless, eternal, and infinite, the power of now. Patience and humility, tenderness and gentleness, acceptance and faith, modesty and selflessness, become embodied following an immersion into deep despair and disillusionment.

Shadow

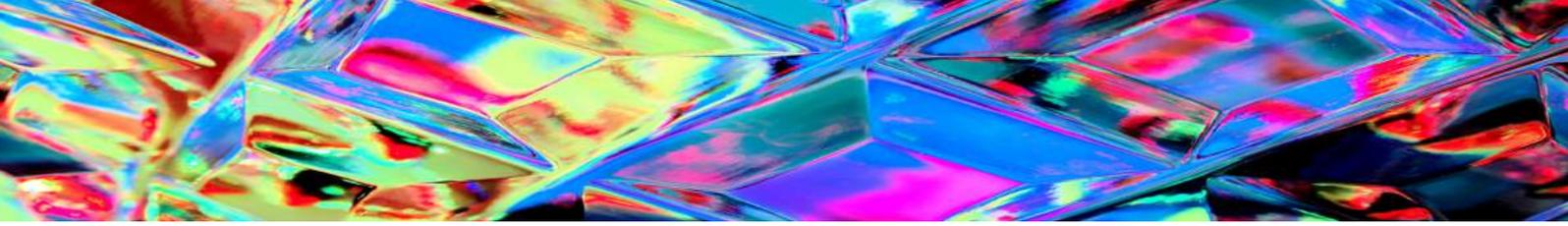
This transition takes a deeper dive into emotions that have hitherto not been experienced in the same way. People are known to experience the dark night of the soul, a time of desolation, as their appreciation of century-old patterns of world evolution and regression can be seen and begin to be understood. The opportunity for humanity to retrieve light and love in the world suddenly becomes quite hopeless, even futile.

Collective shadow emerges. Experiences include encountering people from all walks of life who have suffered from tragic and abusive experiences in their lives; a complete reprieve from rational thought while reflecting on, learning from, and healing endemic regrets and the most incoherent human errors of judgment; and an immersion into grief and despair. This type of shadow experience leads to unconditional acceptance, endless patience, deep compassion, and a sense of surrender to cosmic evolution. Will is transmuted, and the mind becomes the instrument of spirit.

Executive Prototype

Executives at this stage would benefit most from a sabbatical! Any drive and commitment dissipate temporarily as the cosmic universe peers through into one's conscious awareness. It is a great time to rewind and reflect, ponder and wonder, and consider human evolution and devolution, involution and revolution.





ALCHEMIST is free

The *Alchemist* enjoys the 5th person perspective. In the MetAware Tier, they become Active and are aware of multi-generational, iterative individual and collective shadow through the ages and epochs of human civilisation. The final stage that can be observed in the post-conventional world is the *Alchemist*. They account for just 1% of the executive population.

Needs/Values

At the stage of *Alchemist*, the evolution of society to enable greater peace and goodwill becomes salient. The *Alchemist* embodies their own intuitive guidance and employs mutually collaborative power to generate transformative shifts in the world that lead to a more sustainable, healthy and equitable world where everyone, the planet and all of life is supported and nurtured to thrive and flourish, grow and evolve. Rather than carry this out through planning or stewardship, it is a matter of rising to the opportunity as it presents itself.

Alchemists are able to hold and embrace wonderful future possibilities while standing firmly in the present accepting and embracing all that is, and being cognisant of all that has preceded and led to the current situation. They look at events symbolically and value both the shadow and the light in the systemic psychodynamics of common human interactions.

Strengths

The *Alchemist* can have a far-reaching impact on their world. They feel free to be uniquely themselves, liberated from any social or cultural conventions, and can feel both delighted and tormented as they perceive, attend to, and process the vast cacophony of thought and emotion that swirls around them while their interior mind is quiet and still. They are able to be fully vulnerable yet vitally alive and vigorous as they give their conscious, compassionate attention to the dynamic interplay in each and every moment to exercise wisdom and compassion in action.

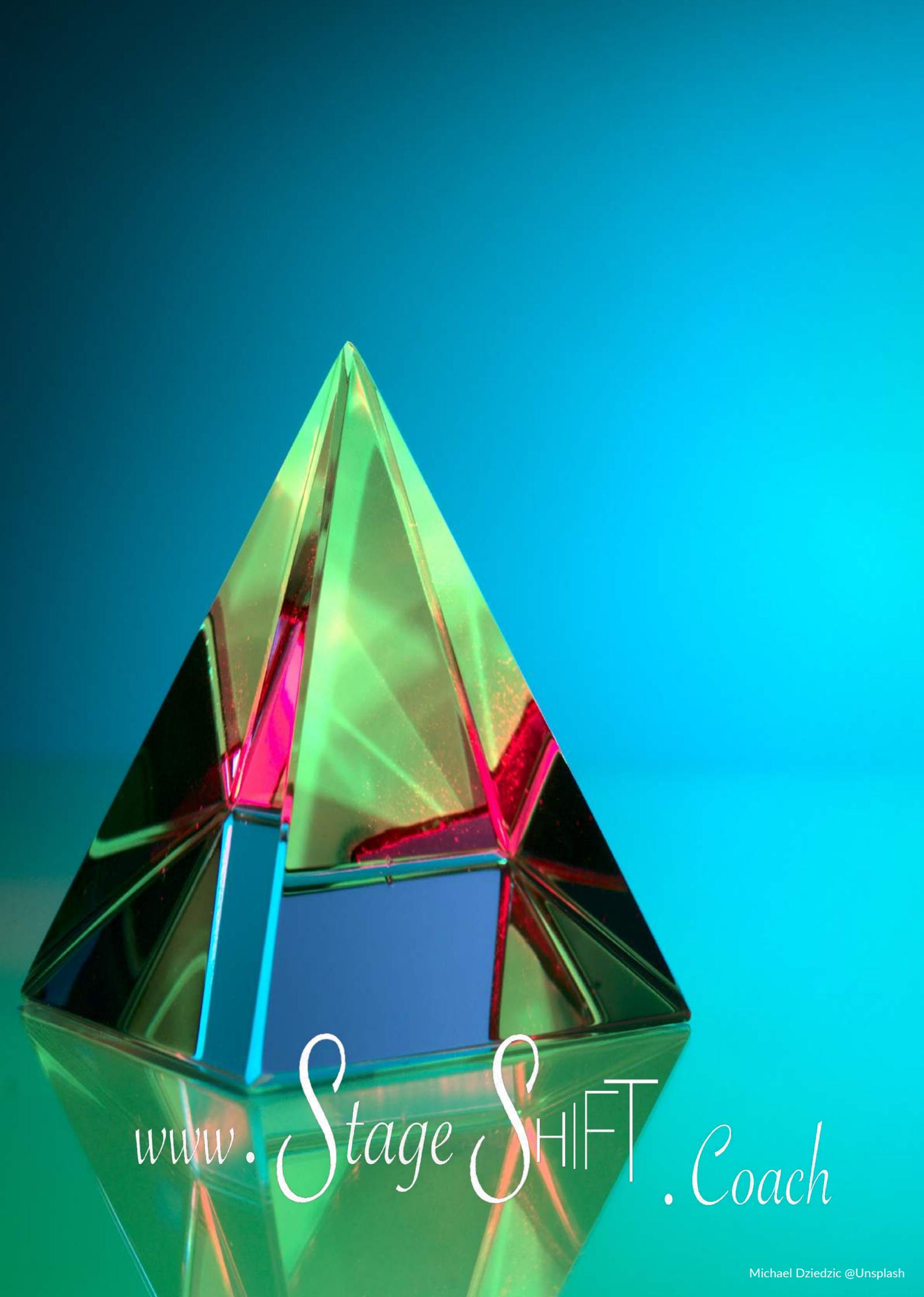
Shadow

The *Alchemist* has released the shadow of their ego through grief, understanding, and forgiveness and has surrendered their personal will to be an instrument in the divine orchestra on earth. They live to evolve in tune with the cosmos, listening into the dark and the deep recesses of their soul's voyage in life. The shadow that manifests at *Alchemist* is the collective shadow of families, countries, regions, religions, cultures, societies, even civilisations. This is explored through energy dynamics such as constellation work.

Executive Prototype

Alchemists are the iconic leaders who ignite and generate social evolution as well as transform global industries. However, there are also many *Alchemists* who are amazingly effective behind the scenes in niche markets and uniquely tailored roles such as strategic consulting, brand design, sustainability initiatives, and executive coaching. They can juggle multiple responsibilities, intervene very briefly yet with significant strategic impact, and live their lives with passion and purpose.



A clear glass pyramid sits on a reflective surface, set against a teal background. The pyramid's facets catch the light, creating a spectrum of colors from green to purple. The text 'www.Stage SHIFT.Coach' is overlaid in a white, elegant script font across the bottom of the image.

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