



## Developing Leaders: Coaching for Renewal

By

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### Abstract

Becoming an effective leader is about more than gaining experience and developing appropriate skills. It is also a developmental journey to increasingly complex world views which create new options for effective leadership. We look at the different stages through which leaders can pass as they travel on this journey of development and how these different stages evoke different coaching interventions. We relate this journey to our Renewal model (presented in detail in the previous issue of the Journal). We also reflect on the implications of our model for coaching practice.

Key words: Leadership, Renewal, Coaching, Development, Action Logic

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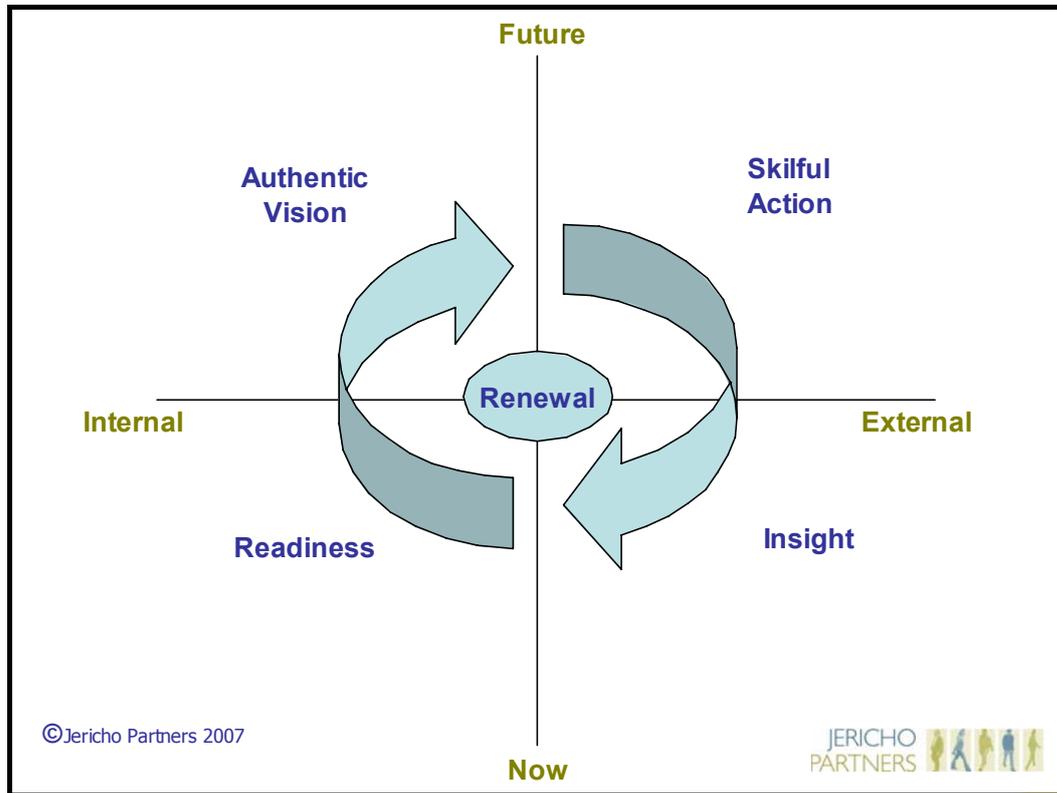
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## Introduction

In our first article (“A Model of Coaching for Renewal”, International Journal of Coaching and Mentoring, VI/1, January 2008, pp 94-100), we explained our belief that people can learn to develop themselves in response to their ever changing world by paying attention to what we have called four territories of Renewal; Insight, Readiness, Authentic Vision and Skillful Action.



In this article we look at the different stages through which leaders can pass on their journey of development and how these different stages require different kinds of coaching intervention. We also reflect on the implications of our model for coaching practice.



## Background

Academic libraries and airport bookstores are full of theories, old and new, popular and obscure, about how the human mind does or doesn't change and develop. Jung himself was realistic about the capability of anyone to change at will:

“Clearly no one develops his personality because someone tells him to do so. Nature has never yet been taken in by well-meaning advice. The only thing that moves nature is causal necessity, and that goes for human nature too. Without necessity nothing budes, the human personality least of all.”

Few deny the need for change. In our work with organisations, large and small, global and local, we have listened to CEO's and Presidents, Talent Managers and fellow Leadership Consultants and have encountered many instruments which can assess the gap between the ideal profile of the super-competent leader and the actual competence levels of existing management. While such gap analyses can provide interesting articulations of what a perfect leader might be, do and think, they all too often end up on the shelf of stressed out global executives. As many a Talent Manager will confirm, with or without a knowing nod to Jung, even in the face of the utmost commercial necessity, all too often, nothing budes.

Yet, as coaches working with individuals and teams, we know that sometimes things do budge and it is our quest to understand what it is that enables some people, sometimes, to change the way they are. For Jung, the development of what he called “true personality” was a vocation rather than a necessity which is why, in his view, “nine times out of ten ... we duck the challenge”. For Maslow, “what a man can be, he must be.” For all of us, the adventure of becoming the person we were “meant to be” creates at least a flicker of interest. Pretty much every employer now claims that people and their development are core to their values and strategy. And as climate change begins to change our world in ways that we do not yet understand it may create a “causal necessity” that will evoke changes in our thinking and in the leadership we need at a global scale.

## The Developmental Perspective

We are all familiar with the idea that children move through distinct stages of development and that, for example, a teenager is not just an older more experienced 6 year old but actually sees the world in a completely different way. What is less widely recognised is that this developmental process can continue through adulthood and that there are distinct, recognisable, sequential stages that adults – and hence leaders too – go through.



Kohlberg Moral Development	Maslow Needs	Spiral Dynamics Social Development	Barrett Levels of Consciousness	Torbert & Rooke Levels of Leadership
Pre- Conventional	Safety	Purple Safety- driven	Crisis Director	Impulsive
		Red power- driven		Opportunist
Conventional	Belonging	Blue Order- driven	Relationship Manager	Diplomat
	Self-Esteem	Orange Success- driven	Manager/ Organiser	Expert
Post- Conventional	Self- Actualisation	Green People- driven	Facilitator/ Influencer	Individualist
		Yellow Systems- oriented	Integrator/ Inspirer	Strategist
	Self- Transcendence	Turquoise Synthesis- oriented	Mentor/Partner	Magician
		Indigo	Wisdom/ Visionary	Ironist

There are a variety of maps of this territory. And just as conventional maps highlight different aspects of a landscape (transport, geology, relief, vegetation, etc) so too do maps of the development territory take different perspectives. Five different perspectives on the territory are shown in Table 1.



**Table 1: Development Frameworks**

Kohlberg’s moral development perspective provides a simple way of orienting to this territory, dividing development into three levels which describe how we relate to the conventions and norms of society. At the Pre-Conventional stage a person acts to avoid punishment or out of self-interest; at the Conventional stage they seek to conform to social expectations; and at the Post-Conventional stage they seek to do what they believe to be right, even if this doesn’t conform to social convention.

People unfamiliar with the ideas of adult development may relate most easily to Maslow’s Hierarchy of Needs. Beck & Cowan’s Spiral Dynamics (Blackwell, 1996) maps the path of development in terms of social value systems and shows what motivates societies, and organisations, as they mature. Rooke & Torbert’s Action Logics framework (“The Seven Transformations of Leadership”, Harvard Business Review, April 2006) describes how leaders make sense of situations. Unlike the other perspectives outlined here, Barrett (Building a Values Driven Organization”, Butterworth, 2006) views the levels less as developmental journey where levels are achieved sequentially over time, but more as a choice about which levels of consciousness to put energy into. Each of these last three has been widely used to support organisational and leadership development and each has been used by Jericho Partners in our work with clients. In this article we discuss the journey to more complex levels of leadership using Rooke & Torbert’s framework

Rooke & Torbert propose that an individual’s “action logic” - how they interpret their surroundings and react when their power or safety is challenged - can and does change over time. They identify a number of distinct developmental stages, each with a different action logic. Stages that are generally found in leadership populations are shown on the diagram below.



As individuals access higher level action logics their leadership grows in depth, range and flexibility. And as coaches working with leaders in different action logics the demands on us change and our attention to different Renewal territories shifts.



The vast majority of leaders that coaches work with will use Conventional action logics. In the section below we compare and contrast working with a leader using a Diplomat action logic with a leader using Expert logic and a leader using an Achiever logic. We also look at helping an Achiever making one of the most fraught transitions on the developmental pathway – to the first Post-Conventional stage of Individualist - and at the demands of coaching a Strategist.

### **The Diplomat, the Expert and the Achiever**

Diplomats want to belong, to be accepted and to be liked. They seek to avoid conflict within the group and to suppress their own needs, so when coaching them it's not unusual to find them reluctant to admit to difficulties and concerns - admitting to them can mean losing face and, to the Diplomat mind, risk losing membership of the group.

Margaret is a senior manager in the public sector. In her first session with a coach, she gave little indication that she was having difficulties. It was only in a three-way contracting session, with her boss and her coach, that it transpired that she was struggling to manage competing priorities. Her reluctance to raise her concerns is characteristic of the Diplomat's need to be seen as being competent and successful.

In coaching Margaret, and any diplomat, it was important to create a safe environment in which she felt able to talk about herself and to explore her own needs with somebody she could trust not to expose her. Coaching started with Readiness, helping Margaret learn to recognise, accept and express her own needs, worries and fears. This freed Margaret up to reconceive her role as someone who 'made a difference'. Her coach encouraged her to a better understanding of her strengths and weaknesses and to explore how she could use her deep understanding of the organisation, her good people skills and relationships as well as her prodigious administrative skills to improve the way things were. Surprising herself with the strength of her suppressed feelings, she went on to articulate a set of actions to improve the effectiveness of the whole organisation. Coaching largely focussed on the 'internal' side of our Renewal model and resulted in some important shifts in how Margaret saw herself and her colleagues. This in turn led to her beginning a new kind of dialogue with her boss about priorities and resources which enabled Margaret to understand her potential to control things in her environment.

Whereas Diplomats identify with what makes them the same as others in the group, Experts enjoy standing out from the group because of their expertise, though they still seek to conform in other ways. Anyone hoping to establish a coaching relationship with an Expert must first establish credibility. The coach can expect to be grilled for relevant experience in specific industries, roles and functional disciplines, and may find that expert clients see time spent on developmental investment like coaching as a 'waste' of their time.

Simon was first introduced to his coach near the end of the financial year. The team he had been promoted to manage at the beginning of the year was some way behind its sales target. Simon was fiercely competitive, results oriented and had been the top salesman in every role he'd ever had. Now holding a senior role in a complex global services company, he was facing failure for the first time in his career. He was angry with his direct reports for their ineptitude and failure to follow his pacesetting example. He was angry with his boss for failing to support him, and with the whole of the organisation which, in his view, didn't understand Sales and which kept imposing meaningless, time-wasting initiatives. Even at this critical time of the year, he had been told to complete performance appraisals with each of his direct reports, a process he had calculated would keep him away from closing deals with customers for a whole week. Meeting a coach, another meaningless idea dreamed up by his boss and HR Director, was also, he intimated, scarcely good use of his time.



The most significant new dimension developmentally of this stage is the beginning of an ability to see things from a third person perspective. Whereas the Diplomat understands his own identity as seen through the eyes of others (second person perspective) the Expert begins to be able to step back and see himself from a distance. This makes increasing their Insight through tools such as 360 degree feedback an important part of the coaching process for an Expert, helping them appreciate not just their impact on people, but also that they can control and vary that impact. In Simon's case, his coach fed back the results of a 360-interview process which characterised him as aggressive, lacking in empathy and unable to motivate or develop his team members. Although he had to be persuaded of the validity of the results, the insight into the impact he was having made him realise that his job was no longer to do the selling but to coach and support his direct reports, that it was that role that he needed to become 'expert' in now.

For many Expert leaders this growing interest in building effective relationships increases their emotional intelligence and starts them on the shift that can lead to an Achiever perspective.

Achievers are interested in working effectively with other people to achieve results. Along with Experts, Achievers are the most commonly found group in organisations. Achievers understand the need to work with others to achieve broader objectives and develop more efficient ways of getting the best out of themselves. They tend to be results oriented, single-minded and clear about what success looks like.

This drive towards perfection and the achievement of ambitious goals combined with effective influencing and management skills often makes for successful leadership. But Achievers can feel guilty or depressed when they believe that they are not succeeding, whether that is not living up to their full potential, or not meeting all the goals demanded of them by the organization. Their response is to work even harder to overcome their 'failure'. The Achiever's belief that if you work hard and efficiently enough you can reach your goals too often pushes them to lose sight of their true priorities. As a result, their most common complaint is lack of time and they may experience considerable stress. It is not by chance that the notion of Work/Life balance raises its head most often in our work with people at this stage of development. Work often gets prioritised before Life.

One client, a highly effective senior executive in a global corporation found himself sinking under the sheer volume of demands on his time. His coach asked him to list his top five priorities and then to review his calendar to see how much time was allocated to each of them. Unsurprisingly his diary was full of commitments not central to his key result areas. In this case, the client had completely rescheduled his time by the next session, only committing to engagements that were fully aligned to his key objectives.

It is typical for Achievers to spend most of their time in the Action territory. Early stage Achievers, locked in Action mode, will work eagerly with a coach to develop more efficient ways of managing their time and improving the effectiveness of their interaction with others. Many Achievers will not progress beyond this action logic, which is unsurprising given that Achiever values (corresponding to the Orange, success-driven culture of the Spiral Dynamics framework introduced earlier) are the norms in Western society.



By introducing the whole of the Renewal process and its territories, coaches can encourage leaders to reflect on ways in which their priorities are not met by their current way of being. Physical health, family relationships and spiritual fulfillment have often been neglected and may be impacting the leader's balance, stamina and ability to provide authentic, inspirational leadership. The questions "Who am I and what do I believe in?" have often been left unanswered in the pressure to achieve. Insight techniques such as 360 feedforward help to focus leaders on the need to achieve greater balance in order to realize their goals and dreams. Clients using Achiever action logics may become ready, perhaps for the first time in their lives, to spend time in some deep reflection (in the Readiness territory). Inspired by a sense of unfulfilled potential, and supported by the coaching relationship, they seek to understand why they are the way they are and how their life experience has contributed to the way they have developed.

### **The Individualist – 'Am I having a mid-life crisis?'**

As this process of exploring their identity continues, leaders may find themselves moving into the territory of the Individualist, a stage of development occupied by only 10% of leaders. This stage is the first of the Post-Conventional stages, so-called because one's sense of self and criteria for success are no longer determined by the external conventions of society and the organisation but by one's own sense of what is important. This transition can be confusing for individuals, as they challenge previously accepted norms and test their assumptions. We have found that sharing models of development such as Rooke and Torbert's helps them to make sense of the changes they are experiencing, and to pursue rather than resist development. In the terms of our Renewal model, the practices of self-reflection and self-observation that occur in the Readiness phase of transition are important as individuals become fascinated watching themselves trying to make sense of themselves. They also recognise the opportunities that now exist to intentionally use who they are in being more effective leaders.

Transition to this stage can leave leaders dissatisfied and disaffected from the relentless pursuit of success against goals that organisations demand. Learning to live fully in the present moment becomes more interesting than the Achiever's drive towards future goals and a much more people-focused style of leadership emerges.

Mark was a lawyer, well-paid and with good prospects, but feeling increasingly disenchanted with his job. Whilst others saw him as successful Mark found himself less and less motivated by the financial and status rewards of his job. He was becoming increasingly fascinated by who he was beyond being a lawyer, and what his special and unique talents and qualities were. At weekends he had started going to various self-development workshops to try and find out.

This lack of interest in his work and increasing introspection made him begin to wonder if he was having a mid-life crisis. Sue, a friend in HR, recognised his falling motivation and, over a drink, listened to his story. She knew that many people in Mark's situation deal with their disenchantment and confusion by leaving their organisations to take a similar post elsewhere (and find they have brought their disenchantment and confusion with them), to become self-employed, or even to completely change direction and lifestyle (one person we know left an investment bank to become a potter). Sue arranged for him to see a coach who helped him recognise the transition he was in – and critically gave him a sense of the action logic he was moving into. From wondering in his darker moments whether he was going mad, Mark found himself on an intriguing journey of self-discovery. He negotiated a new role with the firm as an internal coach, specifically with a focus on helping those lawyers with an Expert action logic who were embarking on the transition to Achiever to make the journey. Having fulfilled this role for the past four years, Mark finds himself increasingly interested in using what he has learned about himself to make a wider impact on his company, its clients and society. He has embarked on the journey to a Strategist world-view.



As the Individualist becomes clearer about who they are and what their unique qualities and skills are, further personal exploration may become less compelling and their interest can turn towards what they can do with the new levels of self-knowledge they have gained. Just as the Expert turned their attention out into the world to find ways to use their skills and becomes an Achiever, the Individualist looks out into the world to find ways of using their gifts and uniqueness and becomes a Strategist. Only a few percent of leaders operate from this perspective.

The Strategist leader is not just interested in building a successful business; she wants that business to be one that has a positive impact in society. Success is important, but only because that means the positive impact on society will be greater. There is an immediacy and directness to a Strategist's experience and an ability to be present to what is happening. They are able to be with their feelings in the moment, to have a strong sense of purposefulness and to transcend their ego needs. This presence also gives them access to their intuition and an ability to hold multiple and conflicting ideas, emotions and possibilities. The complexity is contained by the ability to see and think systemically which emerges strongly at this level. Strategists are comfortable with their limitations – and indeed celebrate them as being part of what makes them the unique person they are and a means to learn more about themselves and others.

Coaching Strategists looks very different from coaching leaders at the earlier levels – it demands a Post-Conventional stance that coaches who are in earlier action logics may find challenging. The coach needs a ruthless truthfulness about themselves and the self-awareness to avoid being caught by their ego's needs for safety, image, status, and so on. The coach must be willing to be vulnerable – to not know, to let go of best practices and models, to risk failing, to risk reputation – and so to be fully present to the opportunity the moment presents. The role of the coach is, in effect, to accompany their client into the unknown and to use the moment to moment experience of the session to shed light on what is. This increases the client's clarity about the reality they are engaged with (Insight), increased their inner freedom and flexibility (Readiness), connects them to their purposefulness (Authentic Vision), and enables them to embody who they are in the world (Skilful Action).

### **Beyond Strategists...**

A further action logic beyond Strategist has been observed, but Alchemist leaders are rare indeed. Alchemists promote quality of life internationally by influencing positive change relative to equality, conflict resolution, creative technology, and ecology. They form mutually beneficial relationships with employees, customers, suppliers, community, and wider society. Leaders at this level ensure that they balance the time they give to service with time set aside for intimacy and solitude. They are often involved with multiple organisations, both to maximise their effectiveness and to enrich their global perspective.



Nelson Mandela exemplifies for us the Alchemist leader and so we conclude this brief exploration of the developmental journey that leaders make, and of how coaches might act as guides, sherpas and companions, with this description of Mandela's journey through the action logics taken from his extraordinary book "Long Walk to Freedom":

- "At first, as a student, I wanted freedom only for myself, the transitory freedoms of being able to stay out at night, read what I pleased and go where I chose. Later, as a young man in Johannesburg, I yearned for the basic and honourable freedoms of achieving my potential, of earning my keep, of marrying and having a family - the freedom not to be obstructed in a lawful life.
- But then I slowly saw that not only was I not free, but my brothers and sisters were not free [...] and that is when the hunger for my own freedom became the greater hunger for the freedom of my people. It was this desire for the freedom of my people to live their lives with dignity and self-respect that animated my life, that transformed a frightened young man into a bold one, that drove a law-abiding attorney to become a criminal, that turned a family-loving husband into a man without a home, that forced a life-loving man to live like a monk. [...] It was during those long and lonely years that my hunger for the freedom of my own people became a hunger for the freedom of all people, white and black. [...]
- I have walked that long road to freedom. I have tried not to falter; I have made missteps along the way. But I have discovered the secret that after climbing a great hill, one only finds that there are many more hills to climb. I have taken a moment here to rest, to steal a view of the glorious vista that surrounds me, to look back on the distance I have come. But I can rest only for a moment, for with freedom come responsibilities, and I dare not linger, for my long walk is not yet ended. (pp750-1)

## *European Mentoring & Coaching Council*

