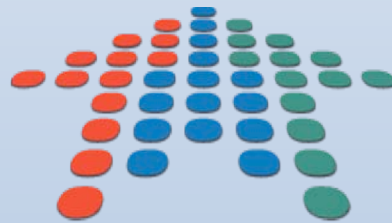


# LEADING EVOLUTIONARY CHANGE

## Capacity Evolution Change Leader Program (CECL)



Interkconnections Inc.  
Capacity Evolution



Interkonnektions Inc.  
Capacity Evolution

# WHITEPAPER OVERVIEW

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The purpose of the Capacity Evolution Change Leader Program (CECL) is to cohere cohorts of change leaders who can act to enhance the ability of global businesses, non-profits (NPOs), social enterprises, cities, governments and communities to improve their “triple bottom line” (TBL) performance. “Triple bottom line” means improving, measuring and managing performance in three key areas:

1. **Prosperity** (the financial health of the entity, its members and its community of stakeholders)
2. **People** (developing and rewarding people so they continually work to increase value for their organization while serving and sustaining their community of stakeholders)
3. **Place** (the geographic or bioregional scope to which you provide the value that generates its health and prosperity while supporting and sustaining its community of stakeholders)

However, we are finding that simply focusing on the three bottom lines may not be enough. To survive and thrive, we need to move the focus of TBL change away from “scarcity” and toward “abundance.”

When we take a “scarcity approach,” the focus is often on being “less bad.” While this is good, it is still, in the end, just a variation on bad! A scarcity approach also often entails a focus on securing our own profit, people and place—often at the expense of others—especially during times of difficulty and contraction. We, ourselves, are often contracted physically, mentally and spiritually as well. We tend to focus on reducing and controlling the access to and use of existing and future resources and creating systems to allocate those resources to serve our limited interests.

On the other hand, when we take a “sustainable approach”—or even more powerful “abundance approach”—we focus on creating “more good.” This means more prosperity for the people and places with whom we engage in any economic, social and environmental conditions. This requires that we open our selves to opportunities to work together, collaborate and seek

to move leverage our collaboration to cohere new systems and structures, create new resources and processes, and see our needs differently.

Moving from scarcity thinking to abundance is fundamentally a shift in perspective and more broadly a shift in paradigm. It is a shift from “me” to “we” and entails holistically expanding our capability to understand our selves, engage with others and lead and design change that will take us where we need to go.

Through surveys of and conversations with professionals, leaders and change agents committed to facilitating this shift, it is becoming clear that the competencies necessary to make this shift include:

- Fluency in systems thinking and mapping
- Strong degree of self-awareness and awareness and appreciation of others
- Developmental interpersonal and leadership skills
- Radical (non-linear) creativity and innovation skills
- High level of adaptability and flexibility
- The ability to consider, align and cohere multiple perspectives into action.

In short, these are competencies that facilitate connection, interconnection, enable collaboration and illuminate the opportunities that emerge when we begin making the shift from “me” to “we.”

To effectively leverage the competencies listed above and others complementary to them, we have realized that it is not enough to just learn them. In our work with individuals, teams and organizations, the best results emerge when we engender and embed holistic development and change. This means helping clients to “onboard” the necessary competencies while developing the capacity to sufficiently hold them and effectively employ them. This requires helping our clients actively



cultivate a worldview that is highly inclusive and tolerant of the benefit that multiple perspectives bring and is capable of leveraging them. To accelerate this change, we work with our clients to create an adaptable sense of scope and context allowing them to see and understand patterns at play from the personal to global levels and begin looking at opportunities for leverage and synthesis. Finally, for people to really engage the world of complexity around them they need similar development within them. Thus, a key element of our work is to generate and hold time and space for reflection that allows people to look within themselves at the changes taking place, and understand and appreciate their own inner complexity.

The CECL program is a product of this ongoing journey we are making individually, as a community of change agents and with our clients. The case and explanation below of the “5 Cs”: Consciousness, Context Interface, Capacity, Character, and Competencies are a distillation of our key learnings and are offered up in service to those of you who are looking to expand and deepen the value, meaning and impact of your work. In the case, all identifying details and names have been changed to protect this client and his organization. Here, we will call him “Ken.”

## Ken's Case: Inadvertently Improving Air Quality and Transportation in India While Resolving a Wicked Mess

*The following case is intertwined with an explanation of the 5C process. It is meant to illuminate how each of the 5C's can be applied and how, together, they form a holistic approach for catalyzing leadership growth and development, organizational change and, through an abundance approach, create lasting value in unexpected and unanticipated ways.*

From 2005-2008, the Interkonnections team worked with the top 164 members of the R&D Division of a global automotive manufacturer that had just acquired a smaller global automotive manufacturer. For the first three years, we worked with a gentleman we shall call "Ken." In 2005-2006, Ken was both a participant in, and internal coordinator for, the executive development and succession planning program we called the "Culture of Leadership" (COL). Through his dedication and development during this process he built a strong personal foundation in the "5Cs" that are covered in the next section.

In 2007, Ken remained a participant in the COL and was promoted from his coordinator role to second in command of a critical project team in India. The company had just completed a joint venture with a top local automotive manufacturer, and project team was tasked with customizing their company's light-duty truck and bringing it to market with higher environmental and safety standards while remaining within the price structure of competing models. This would, it was hoped, bring the joint venture substantial market share through local customer loyalty while also allowing the company to develop a positive and progressive relationship with the local and national governments of the host country, and further increase the triple-bottom-line image of the company in the global market.

Then, only months into Ken's new assignment, the project hit a severe bottleneck that threatened to either shut down the project or run it several months and millions of Euros over budget. The core of the problem was that the Indian partner's customers demanded vehicle specs (e.g. weight limits) that were illegal in the global partner's countries, and Indian government officials were ambivalent. As a result, the engineers and corporate communications departments of the global partner were unwilling to customize the light-duty truck to host partner specs without multi-year safety trials. After two months of a stalled project, Ken raised the topic in our monthly executive coaching session.



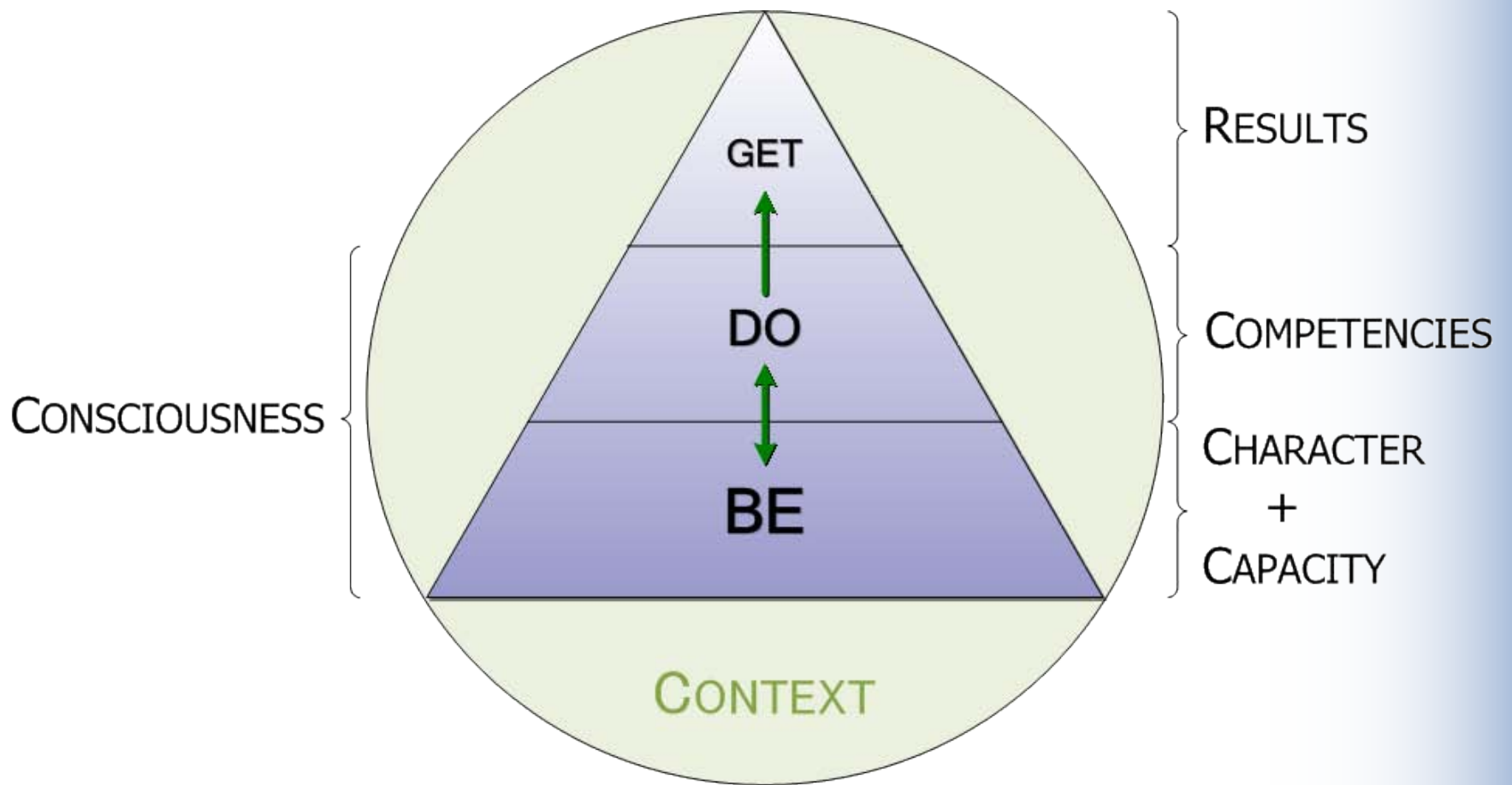
## **The Practice of Leading Evolutionary Change**

When we engage in any potentially evolutionary change endeavor such as being a parent, leading a project or division, running a company, guiding a community, taking responsibility for a city, or running a country, a question we ask of ourselves—and that others ask of us—is “How well will we fulfill the role that we have accepted and stepped into?” The answer to this question depends on many factors—both external and internal. We learn (or have our memory refreshed) soon enough that we can not control the external factors that will arise while we hold that role. What we can do is to evolve our capability to fulfill the role, and use our capability to influence the environment and people around us. This section provides an overview of the “the 5C Operating System” that allow us to effectively use and evolve our capability to grow, make wise decisions in relating with others, and influence the environment around us. These interwoven “5Cs” are:

1. **Consciousness**
2. **Context Interface**
3. **Capacity**
4. **Character**
5. **Competencies**

Throughout this section, please consider how these 5Cs relate to you and your endeavors, since the only guaranteed transformation we can make is to transform ourselves—and thereby influence the people and world around us. Because this section is a summary of each of the 5Cs, the elements that comprise it and the tools and techniques that enable transformation related to that “C” are not explained in detail. A brief overview is provided along with “Ken’s” Case.

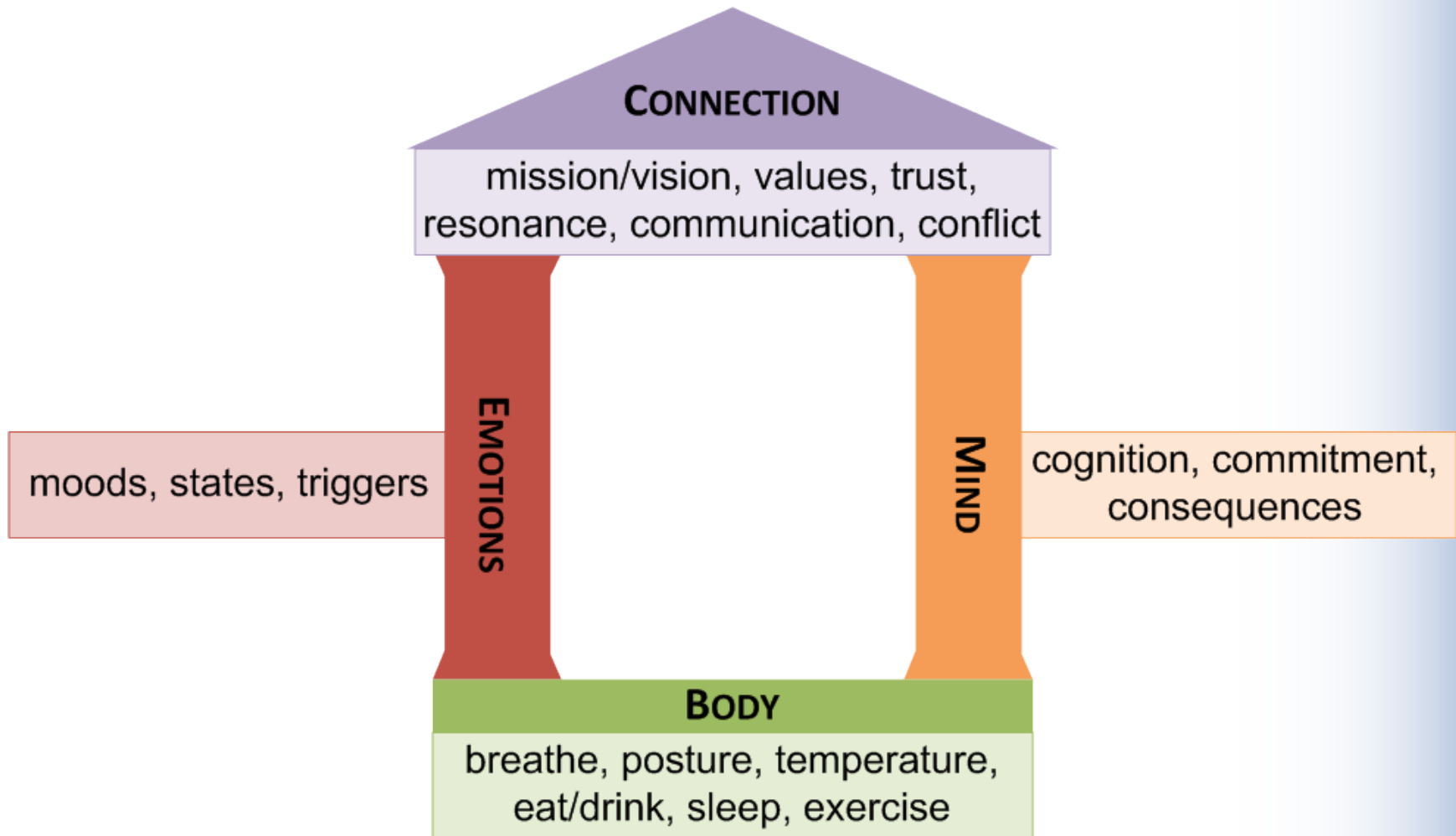
For further information on the 5C OS and related elements, tools and techniques, please see our upcoming books: *Leading Evolutionary Change*, *the Transformational Leader Fieldbook*, and *Assessing & Engaging Leadership Transformation* (a “MAP” Primer).



## Consciousness

In the 5C framework, Consciousness (our “state” of being) is the way in which we perceive, understand and act in the world moment to moment. The quality of our Consciousness affects the quality of our experience, results and affect on and with other people and our environment/context. Our quality of Consciousness in any given moment is affected by our health and balance within and between several spheres of Consciousness. For our work, we focus on four interconnected spheres of Consciousness:

1. **Body (Physiological):** This is the awareness of movement of energy in the body, how we breathe, how we sleep and dream, how we align ourselves and our posture, how we are affected by what we eat and drink, the quality and amount of exercise we get, our body temperature, and other bodily processes.
2. **Emotions (Affective):** This is how well we assess and manage the feelings, sensations and moods that arise within us such as joy, anger, sadness, boredom, frustration and hope—how we respond to them and, sometimes, how we feel pulled from one pole to another in short periods of time.
3. **Mind (Cognitive):** This is how we process information, what we commit to, how we organize meaning and information to exchange it and communicate with others, and our ability to predict and change the consequences of our actions.
4. **Connection (Social & Spiritual):** This is our felt sense of connection to that which we sense is beyond us, both in terms of a wider group of people and a deeper way of being. It includes faith, our mission/purpose, development and application of values, sense of potential, and the level of resonance, trust and conflict we have with others.



### **Ken's Case: Consciousness**

Divided physically and mentally between India and Japan, and with the project stonewalled, Ken was simultaneously undergoing culture shock and severe work-related stress. Our first task was to bring him into balance in the area of consciousness. We developed a body pattern of breathing meditation, six hours of sleep per night (the most that could realistically be achieved under the circumstances) and a simple exercise routine he could perform even in hotels. We also created an "emotional hotline" for him with his wife and a trusted colleague, and worked out a short-term personal mission ("creating a fully integrated, customized solution") that connected him to his headquarters, his new location and a deeper sense of purpose that fully called forth his commitment. This renewed inner balance highlighted his lack of clarity about his new external environment.

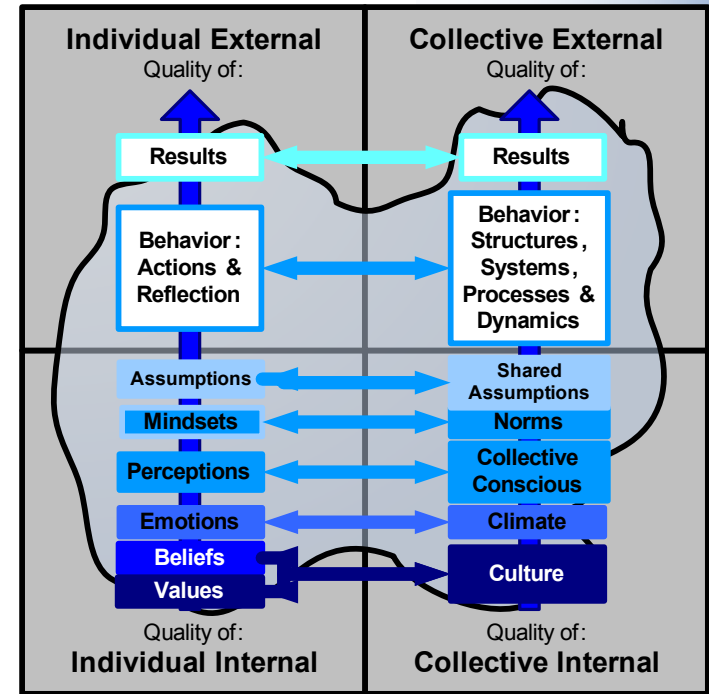
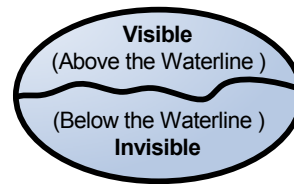
### **Context Interface**

Our internal drivers and the filters we use to interact with the people and world around us, moment to moment, is our Context Interface. The "moment to moment" aspect is crucial, since the quality of our interaction or "interface" frequently changes in response to interwoven external and internal stimuli that may also change rapidly. A useful first-step tool to use with clients around Context Interface is the integration of a slightly modified version of Ken Wilber's "4 Quadrants" or "4Q" (which has been turned on its side) with the "Iceberg Model" from intercultural studies. The lower half of the diagram is the invisible ("below the waterline") dimension of individuals and groups that can not be seen, such as values, beliefs and emotions, perceptions, mindsets and assumptions of individuals; and the culture, climate, collective consciousness, norms and shared assumptions of groups. The upper half of the diagram shows the visible ("above the waterline") behavior of individuals (their execution and reflection) and groups (their structures, systems, processes and dynamics) and the results they generate. Without trained awareness, the number, relationship and complexity of these factors in each situation makes the situation difficult for us to grasp, and easy to misunderstand. By mapping the influence and relationships of these various elements and determining how to engage in conscious Context Interface, we are able to better understand, act and reflect on our internal drivers, filters and behavior, and the results we generate.

### Ken's Case: Context Interface

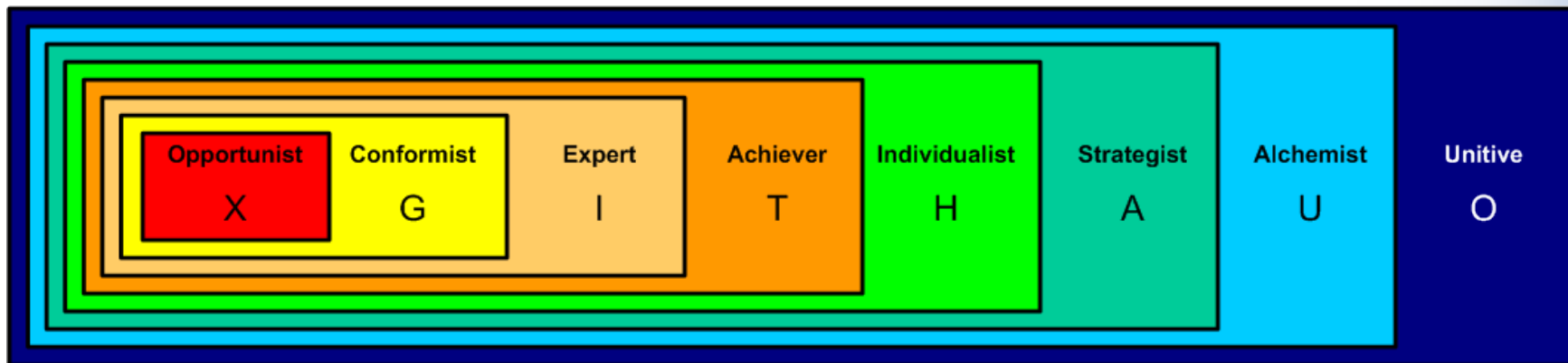
To clarify and assess Ken's work environment and stakeholders, we first completed a SPECTREM analysis, stakeholder map, value chain of the light-duty truck, and 4Q analysis of key stakeholders. The 4Q analysis revealed that the majority of the issues (e.g. relative perspectives on environmental quality and safety vs. personal and/or company cost) were culturally different and therefore embedded as very deep values that would not be changed by more argument and dialogue.

To successfully resolve the issues, a "super-ordinate" structure that held and allowed both sets of cultural values to exist and operate in the concrete world of designing, making and selling the vehicles would have to be created. Executives and some employees in both organizations could see this, but could not see HOW to reconcile the competing values either intellectually or in practical application.



## Capacity

Our Capacity is the baseline from which we perceive, understand and act in the world on a relatively stable basis. This both influences the other 4Cs and is influenced by them. Our Capacity framework is based on the results of the past 30+ years of research into human development independently conducted by researchers and practitioners from elite institutions and organizations. For our research and chart showing the relationship of these various models, please visit the Interkonnections website. The research identifies distinct stages in human development based on cognitive, emotional, ethical, needs, social, and values metrics. We have integrated this knowledge with the latest research in leadership and global management competencies to create our Leadership Stages model ("X" to "O"), shown below correlated to each of Dr. Susann Cook-Greuter's stages of ego development ("Opportunist" to "Unitive"):



Over our lifetime, most of us adapt to, and later may influence and lead, the changes that are expected of us by our families, friends, organization and colleagues and society. All of us begin as infants, dependent upon our parents for food, shelter, health care and love.

X	We then begin to differentiate ourselves from our parents, asserting our wills and learning to say “no.” X-shaped people are trying to do what they want and only allowing others to influence them when the “other” is perceived as stronger.
G	Our families and schools then begin to shape us, to exert social, emotional and authoritative pressure to ensure that we learn to value and behave in ways that are comfortable and “normal” for that particular context. G-shaped Leaders rely on a stable structure or system and following the political rules to rise to the top.
I	Academically, professionally, athletically, artistically, etc. we may then begin to lead others based on knowledge or ability in one or more specific areas of expertise (“I”).
T	Some people may grow into leading groups or teams at various levels in the social or organizational hierarchy by setting self-determined goals and driving people together toward specific results (“T”).
H	A relatively small number of people venture outside of their socio-cultural context, exploring the relative equity of various value systems and ways of being, doing and living in the world. Over time, these people may learn to build bridges, helping different groups of people to communicate more effectively, harmonize their ideas and actions, and collaborate to create new options, products and services, and solutions.
A	An even smaller number of people learn to see the world as systems of things, and various groups of people as systems of stakeholders. We may learn to see the value systems that hold people and develop competencies to assess and align people, things and systems. Strong A-shaped leaders are is capable of guiding people to change to meet emerging needs and contextual demands. These people are able to truly create value—and create or upgrade value-chains to more effectively meet market, social and ecological needs and opportunities.
U	Very few of us do the work to see that we are all held in the cradle of language, that even I myself am merely a story I tell, and that the story is impermanent. These people may cohere systems into constellations, entities that remake the stories of systems—even as they help to remake humanity toward the next phase of our co-evolution with our planet. And a handful of these may change yet again, learning to see existence beyond the grip of language—seeing the world moment by moment, and thought and time as an
O	interesting fiction.

Of course, this is not a smooth progression. It is full of ups and downs, twists and turns, and we are constantly changing and in motion. Throughout our lives we orient and reorient our selves in the process of change. People may stop at any point in the process due to a lack of will, challenge or sufficient support that prevents them from moving forward. Or they may simply reach a point at which they are in harmony with their environment and there is no need to change—until the environment itself changes again. People may also regress if mental, emotional or life conditions shift them into a prior way of seeing, being and doing in the world. None of this is necessary “right” or “wrong.” What is most important is that we find a way to most effectively and healthily fulfill the roles we play throughout our lives. By developing our capacity and helping people do the same we provide a powerful foundation to leverage the other 4Cs to be wholly and fully who they need to be in those roles.

### **Ken's Case: Capacity**

To create a structure that was capable of holding the core values of all key stakeholders in a sustainable solution, we first assessed the values and resulting behaviors of each group. For the most part, the local buyers operated within an “X/G” blend of focus on personal profit and following local customs, while the local corporation operated from a “G/I/T” blend of increasing profits and market share by delivering technical solutions that fit local customs and local buyer preferences. The foreign corporation operated within an “I/T/H” blend of increasing profits and market share by delivering technical solutions that fit global best practices for the automotive industry around safety and environmental standards that would match corporate values, public opinion and mid-term governmental regulations (matching vehicle standards to future regulations reduces the amount of redesign required before the next model is created).

Ken, having added some “A” into his “T/H” blend in the previous two years of working with us, was able to co-create a values map that showed not only these value blends for each group, but also the need for an “A-type” systemic solution that would allow each of the groups to change specific concrete behaviors while continuing to operate within their pre-existing worldviews. Before he could create this systemic solution with his colleagues, Ken realized that he would need a better understanding of the personal character and cultural traits of the key stakeholders so he could guide the creation of a system that would fit these traits rather than fighting them.

## **Character**

As people and as leaders, the character of each of us is both unique and is strongly influenced by a variety of “styles” that have emerged within our selves and the cultural environments in which we were raised and shaped. The “style” influences that our clients have found most useful and influential to work with include:

- Personality style (e.g. Enneagram, DiSC, Myers-Briggs)
- Gender style (masculine and feminine, yin-yang)
- Family pattern style (discussion-based, authoritarian, no model or theory)
- Educational environment style (discussion-based, context based, experiential, drilling, no model or theory)
- Religious and/or philosophical style (mono-theistic & poly-theistic, internal & external locus of responsibility and control)
- Organizational hierarchy and functional (R&D, Production, Sales, HRD, flat, distributed networks, etc.) styles
- Organizational cultural style (Gareth Morgan’s organizational styles, stages of organizational culture development ala Barrett and Adizes)
- National/ethnic cultural style (polarity management & dimensions of culture, Enneagram, stages of cultural development)

### **Ken's Case: Character**

In the Culture of Leadership, Ken had been trained to use the Enneagram, and assess and adapt to different cultural styles (organizational and national). However, he quickly explained that he found these perspectives “interesting, but not very useful.” Our first task, therefore, was to work with Ken on an issue that comes up for many “5C” practitioners: the “5C’ blindspot.” All of us find it easier to understand and engage some of the “5C” perspectives than others, and many of us find it easier to simply ignore one or more of the perspectives. By exploring with Ken how his own personality style was influencing him to avoid the pain of “being with” the project issues, and sharing concrete knowledge of Indian cultural styles that affected the situation (e.g. a more philosophical than action-oriented stance on the safety issues resulting from overloading vehicles), he began to more fully accept the value of the “Character” perspective, “sit with” and work through the pain of the project bottleneck, and incorporate the polarities of Indian and Japanese values and behaviors into his awareness and assessment of the project situation—the first and second step in moving toward effective action. One perspective was still missing, however, the specific competencies that the project team needed a stronger base in to succeed.

## Competencies

Competencies are the specific skills that allow us to engage in a specific activity or practice (e.g. being a parent, leading a project or division, running a company, playing tennis, playing the piano, boxing, writing a book, painting a picture, singing, etc.) and achieve a certain level of results.

To use a metaphor that is meaningful to most of our clients, Capacity is the “size of the container” that we have to perceive, understand and act in the world and Competencies are what goes into that container. Both of these must be matched to the context. If the context requires a project leader, then the Capacity of “T” may be most appropriate because this is the stage at which project management and integration can really begin to be leveraged. Competencies should also reflect the needs of project leadership (e.g. time management, schedule management, budget control, communication, risk management, etc.).



Even a world-class tennis player who is operating at “A” Capacity would be unlikely to successfully lead a project or organization (and may cause considerable damage) if they have not successfully led teams or organizations before and have not been trained in the Competencies of project management or running an organization. Conversely, project leaders approaching project management at an “I” center of gravity can severely slow or damage the project due to a tendency to focus more on the parts than the whole.

In working with change leaders, change projects and organizations, we have found it useful to focus on both the specific Competencies required by a person for a project or situation in a specific context as well as the Categories (groups) of Competencies that are required for specific kinds or levels of change projects and/or organizational leadership.

In the context of the Culture of Leadership (COL) (see Ken’s Case), the Categories and Competencies were simplified into those required to successfully complete “T-Type” (single-culture, stable context), “H-Type” (multi-cultural, gradually changing context), and “A-Type” (need to integrate multiple cultures and/or stages into one system, rapidly or suddenly changing context) change projects and development.

Sample of COL T-Type Competencies	Sample of COL H-Type Competencies	Sample of COL A-Type Competencies
<ul style="list-style-type: none"> <li>• Pro-activity &amp; Accountability</li> <li>• Strategic Decision-Making</li> <li>• Process &amp; Product Innovation</li> <li>• International Project Leadership</li> <li>• Delegation</li> <li>• Performance Evolution</li> <li>• Effective Meetings</li> <li>• Global Negotiation</li> <li>• “Fit-to-Role” Alignment</li> </ul>	<ul style="list-style-type: none"> <li>• Managing Across Cultures</li> <li>• Systems Thinking &amp; Action</li> <li>• Project Portfolio Management</li> <li>• Constructive Communication</li> <li>• Global Teamwork</li> <li>• Facilitation</li> <li>• Business Innovation</li> <li>• Leveraging Diversity</li> <li>• Function Leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Integrative Thinking</li> <li>• Dilemma Management</li> <li>• Value-web Mapping &amp; Cohesion</li> <li>• Stakeholder Management</li> <li>• Value-stream Integration</li> <li>• Business Strategy &amp; Scorecard</li> <li>• Mentorship</li> <li>• System Leadership</li> <li>• System Re/Design</li> </ul>

### **Ken's Case: Competencies**

Both the global partner and local partner were exceptionally competent in market analysis, project management, product design and development, technical modification, negotiation and decision-making. In addition, the global partner's people were somewhat skilled in global teamwork. We quickly identified, however, a critical lack of the "H-Type" and "A-Type" competencies that were required for project success. The critical three competencies that were lacking (and therefore that Ken would have to supply to the project) were:

Leveraging Diversity (What specific resources did each partner have that others did not—e.g. customer trust, access to technology and standards—and how could these be most effectively combined to contribute to the project?)

Value-stream Integration (Who in the value-stream was currently responsible for what roles, and how this could be changed to create a more effective system?)

System Re-Design (How did the system need to be redesigned to incorporate diversity and value-stream integration, and who would undertake that redesign?)

## **“5C” Coherence**

Each of the “5Cs” brings an important perspective and set of tools to the practice of change leadership. As you can probably imagine after reading the “Practice” section of this whitepaper, insufficiently addressing any one of the “5Cs” can leave a critical gap in awareness, assessment, and aligned action that can create problems in a change. As powerful as each of the “5Cs” is by itself, however, their true transformational power lies in understanding and engaging the connections and interplay between the “Cs” and bringing them into coherence as they relate to each specific undertaking, environment, and the people involved. As we developed this system, we’ve realized this is not something we can do right off the bat. It takes practice and time to understand and use them effectively. So as a first step, this whitepaper has tracked Ken’s engagement with each of the “5Cs” as if it were a logical sequence or step-by-step process. This is, in fact, how we usually engage in beginning “5C” work with clients (although the sequence of the “5Cs” often changes depending on the circumstances) since it is easier to grasp and work with initially.

The Capacity Evolution Change Leader program has emerged as what we believe to be the most effective way to teach this. This process usually begins with a 3-day initial engagement with the “5C” framework. Please see the “Programs” section for an overview.

### **Ken's Case: Creating a Systemic Solution and Epilogue**

After working through the process outlined above, Ken's executive coach, in a pivotal coaching session, challenged him to redefine the situation so the Indian corporate and government stakeholders designed the vehicle and our client organization held them to specific technical, safety and environmental standards that reflected global best practices. In a three-week process of absolute brilliance that drew fully on both his technical background as an engineer and his leadership development gained through the Culture of Leadership, Ken created a highly detailed concrete plan that satisfied not only his Japanese headquarters and the local partner, but also drew praise from top decision-makers in the global headquarters.

After several weeks of discussions with a wide range of stakeholders, the global HQ commanded Ken to take over the project and implement his plan. This changed the stance of the global partner from "you must accept our product" (which the local partner felt they had no control over and could not sell) to "you are free to design the product to meet your customers' demands—and it must also meet global best practices that, by the way, will improve your ability to design future products for a wider market." Over the next six months, Ken led the project team, local partner, and local government officials to a successful completion of product design that not only saved the company from months of project overrun and the associated hundreds millions of Euros—he also eliminated the need for the originally planned project time—and the hundreds of millions of Euros associated with the initial plan.

At the end of his assignment, Ken was given an official commendation by global HQ, promoted from "Manager" to "Director" (bypassing "Senior Manager") and given a new task of creating a new integrated customer service division that drew people from R&D, Production, Sales and other departments.



Interkonnektions Inc.  
Capacity Evolution

# PROGRAMS

## Overview

As change agents the most valuable tools we have in our toolkits are our selves. To be of best service to the clients and communities we serve, we need to be constantly improving our selves and enhancing the tools and resources we bring to our work. As the need for leaders, organizations and institutions capable of engaging with increased levels of complexity and sustainability increases, we must also evolve our capacity to support them and their development. The Capacity Evolution Change Leader (CECL) program has emerged from our work with clients and research into how best to accomplish change by approaching the change process holistically, with an integrated model. This paper has introduced the CECL Operating System (OS) and demonstrated how it has been effective at generating evolutionary change at the individual and organizational levels. This section briefly describes the system we have developed to share this technology.

In the development of CECL we have drawn on best practices and leading theory from:

- Harvard University
- Integral Institute
- Intercultural Communication Institute
- International Coach Federation Master Certified Coaches
- Spiral Dynamics
- Cutting edge practices in somatics and somatic education

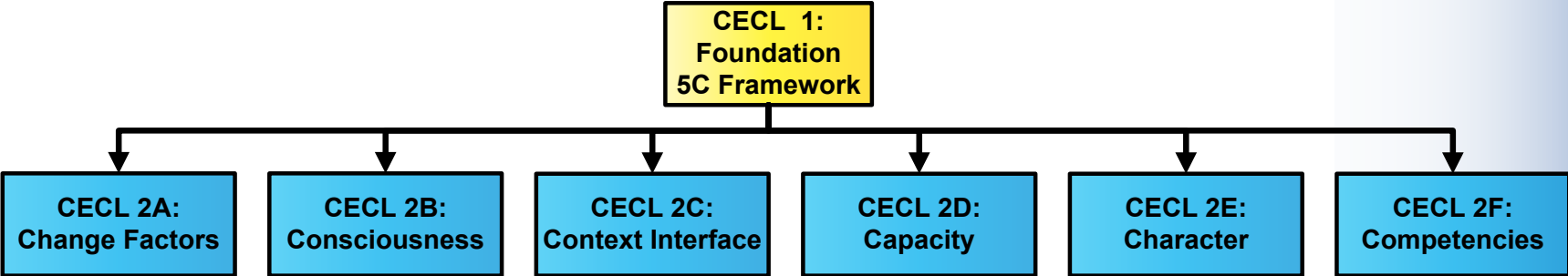
CECL has been rigorously field-tested and refined. We have integrated the OS with an evolving set of change practices that have produced significant and sometimes breakthrough results with:

- Global corporations
- Social enterprises and non-profit organizations (NPOs)
- City governments
- Academic institutions
- UNCRD
- Organizational leaders
- Professional change agents

As a result, the CECL program enhances the capability of change agents to:

1. Learn and grow personally as well as professionally as a change management specialist, coach, consultant, HRD manager, facilitator, organizational development specialist, talent development director, trainer or other change agent role
2. Develop other change leaders as well as leaders of communities, organizations and projects
3. Lead change initiatives either in a formal role as a member of a organization, community or project leadership team, or in an informal role as someone who wields power, influence and/or thought leadership that affects how the project, organization, community or city operates and performs
4. Deepen and expand the impact of their work to begin generating sustainable, abundance generating results

CECL begins with a three-day Foundation (Level 1) workshop and deepens the process of learning and growth in six Technologies (Level 2) workshops:



Let's take a brief look at the programs:



## **Level 1 (Foundation)**

Foundation is a three-day workshop that provides an overview of the change leader “operating system” (OS) that is a concretized version of leading theory and practices from Harvard University, the Integral Institute, the Intercultural Communication Institute, the International Coach Federation Master Certified Coaches, Spiral Dynamics, cutting edge practices in somatics and somatic education as well as many other influences. By “concretized” we mean that we provide several rigorously field-tested and refined protocols that we have developed and used to effectively support the transformation of client leaders and their organizations. This change leader OS underlies the CECL approach to change leadership. Although we rarely share this OS with clients unless they explicitly ask “how” our approach works, we share this with potential CECL change leaders first to ensure that they are comfortable with the methodology and it will fit their approach to change leadership. In other words, it serves as a screening mechanism to ensure that the “fit” between potential CECL change leaders and our approach is a good one. The Foundation workshop provides an overview of change leadership including the “Change Factors” (Change Types, Change Levels, Process of Change) and “5Cs” (Consciousness, Context Interface, Capacity, Character and Competencies). It specifically helps potential change leaders assess change opportunities and decide where to invest their resources and abilities and how to best be a change leader in those situations and initiatives. Through this process, it helps participants identify and begin to develop new change agent “muscles” and deepen their awareness, assessment, action and alignment in one change project with support from their instructors and peers.

Participants who complete the 3-day Foundation course will have:

- Deepened their capacity to more fully engage with clients and the challenges of change
- A holistic understanding of what it means to be an effective change leader
- A better sense of when and how to engage effectively in change projects
- Processes and tools for improving project performance
- Basic grounding in a comprehensive methodology that will enhance results in any change project, organization development project or leadership development program

## **Level 2 (Technologies)**

After completing the Foundation workshop, participants may choose to engage in deeper work with one or more of the “5Cs” and the “Change Factors” (Change Types, Change Levels and the Change Process).

Learning and practical application for each “module” includes:

- Two-day or three-day workshop
- Opportunities for Fieldwork and
- Group coaching calls.

There is no specific sequence to the workshops.

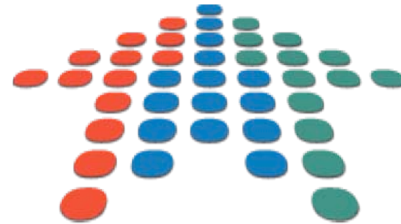
Practitioners who choose to complete all six will receive a CECL Certificate, and are certified to work with Interkonnections and select Partner Organizations as Change Leaders.

What you get in Level 2: Participants who complete each “module” (2A-2F) will have:

- The ability to assess the current situation and the change required using that component
- A substantial “toolbox” of field-tested, refined and effective best practices for engaging change from that perspective
- Practical examples and experience in how that perspective influences change

Participants who complete all “modules” (2A-2F) will have the right to advertise and engage in initiatives as a certified Capacity Evolution Change Leader as well as support from Interkonnections and its partners in creating and leading change initiatives.

# INTERKANNECTIONS



Interkonnections Inc.  
Capacity Evolution

Interkonnections is a community of change leaders committed to helping our clients evolve their organizations, leadership and talent in ways that sustain and create value economically, socially and eco-systemically at both the global level and the communities within which they operate. We do this by working with them to create a cultural and systemic tipping point of abundance where we are able to continually improve performance and generate added value along a triple bottom line of prosperity, people and place for ourselves, our organizations, communities, cities and the ecosystems that sustain us. We do this to help meet the changing needs of our clients and communities in the 21st Century, and leave the world a better place for our children.

## The Authors



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Chad is a Principal of Interkonnections, Co-Director of Integral Japan, Assessments Director for the Intercultural Communication Institute (ICI), Projects Director for Abound and Green HR Advocate Leader for the Japan HR Society. He has led change management, leadership pipeline, and organization evolution projects with global corporations, SMEs, local governments, NPOs and the UNCRD since 1995 in both English and Japanese. He also serves as a Global Executive Coach and has lectured at the Kyoto University MBA School. Chad holds a Master's Degree in Intercultural Relations from ICI and is certified in Susann Cook-Greuter's MAP/Leadership Development Framework, Spiral Dynamics integral (SDi) Level 1 and Level 2 (Organizational Design, Personal Emergence, Applications), Cultural Training Tools, Harvard's Negotiations for Strategic Success, Negotiating Intercultural Conflict, Global Executive Coaching, and Advanced Intercultural Training.



**Zach Smith**

Zach is a Principal of Interkonnections, a co-founder of Abound, a sustainability leadership development organization, and Eco Nikko, an organization focused on individual health and development through retreats in Nikko, Japan. With over 10 years experience in human and organization development. His areas of expertise include human resources strategy and management, learning program design and implementation, coaching, facilitation, whole systems change and sustainability. Zach works with Fortune 100 and 500 organizations across a wide range of industries including accounting, airline, automotive, banking and financial, food service, IT, management consulting, petroleum, pharmaceutical and retail as well as regionally based organizations and start-ups. Zach has provided sustainability workshops for Antioch University in the US from where he also received a Masters in Organization Development and Change



**Dr. Norio Suzuki**

Norio is a Principal of Interkonnections and Director of Integral Japan. He has over 10 years of experience in human psychology and development (assessment, consulting, coaching, and training) with Fortune 500 companies, NPOs, and individuals. A large part of this work is in developing Leadership Pipelines and conducting Executive Coaching and Leadership Assessments in corporations. Norio holds a Ph.D. in Humanities from the California Institute of Integral Studies (CIIS), and is certified in Susann Cook-Greuter's MAP/Leadership Development Framework and Profile, Spiral Dynamics integral (SDi) Level 1 and Level 2 (Personal Emergence), and Negotiations for Strategic Success. He also led the CIIS community that used the Subject/Object Interview while acquiring his Ph.D.