

## Some things are impossible – until they're not:

### *Solving “intractable” Business & Social problems*

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Some things seem impossible. For us<sup>1</sup> in our work, it especially seemed impossible to get a variety of stakeholders – all with different perspectives, different goals, different constituencies, different measures of success – to come to shared understanding and agreement about how to work together to achieve something completely new – something that would advance both the needs of each of the individuals and the collective as a whole. It seemed impossible in corporations, in communities, in non-profits, and in whole societies. And it was... until it wasn't.

An example. What if we were to tell you that, in Guatemala, we engaged leaders of the national intelligence service and the military policy & leadership institutes, on the one hand, and members of the former guerilla movement on the other; leaders of the Catholic church, on one end of the spectrum, and the leading Mayan philosophers, on the other; the leader of the President's commission on local economic development, from one end of the hierarchy, and the leaders of local villages, from the other; and so on – thirty different perspectives? And, then, created a simple (well, relatively simple), one-page systemic representation – a “map” – of their combined world views – one that they all understood and agreed represented their world – all of it's parts and all of it's interactions. And, then, came to shared agreement about the overall goal of their collective world. And, finally, identified the handful of critical resources (six, in all – out of 140+) that would enable them to move their world in the direction they all want it to go. And they did it by investing just seven days of their time. Some thought it would be impossible. And, it was... until it wasn't.

And, before one starts down the path of choosing to believe that this won't work in the private sector, we did the same thing for HP's Global Notebook Supply Chain as they grappled with how to coordinate both within their organization (marketing, finance, engineering, design, purchasing, quality assurance, logistics, etc.) and across others (customers, resellers, component suppliers, original design manufacturers, shippers, foreign governments, competitors, etc.) to ramp

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<sup>1</sup> The “us” here refers to Jim Ritchie-Dunham (my good friend and partner in much of this kind of work and my original mentor in the field of system dynamics/systems thinking) and myself. (see also footnote 39)

production from 10MM on time deliveries annually to 30MM over a two-year period. Again, they thought it was impossible – until they did it. So, while we cite Guatemala as an example (primarily because it 's a public process and, therefore, sharable), we'll also offer up evidence of how and why this works in the private sector, as well, asking you to use your own judgment (and imagination) about how this applies in your world.

So, naturally, a few questions arise. “How did they do that?” “Can it be repeated?” “Can others be taught how to do it?” The answer to all of these questions, if we may borrow from Peter Block, must be (and, by the way, is) “yes”<sup>2</sup>. We have to begin to do the impossible – to solve problems that seem insoluble – to successfully contain and resolve complex, multi-stakeholder problems – to tame wicked problems<sup>3</sup>. That's what's up for us today – that is the work of our world – now and, likely, for the next several decades to come – if our children and grandchildren (and even most of us!) are to have a world worth living into. And, as it becomes clear for you that this is possible, then you'll be left with your own question – “Now that I know this is possible, what's stopping me?”

Solving these is a collective, collaborative endeavor – requiring a 360 degree view – and a 360 degree conversation. And it's aided – actually, made possible – by integrating principles and practices from system dynamics<sup>4</sup> and systems thinking<sup>5</sup> with recent developments in systems centered group dynamics<sup>6</sup>. System thinking and systems dynamics<sup>7</sup>, as we've adapted and further developed them here, provide the structure that enables meaningful, fact based, productive conversations about complex, often highly charged issues. But, historically, systems-thinking alone hasn't been enough. For us, it's been the combination of a systems-thinking structure with a collaborative process that has made these complex, difficult conversations simple, meaningful, human events – yielding human solutions. And, as you will see below, not just any collaborative process but one that acknowledges and leverages the complementary significance, contributions and genius of both the individual and the collective – rigorous multi-stakeholder collaboration.

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<sup>2</sup> Block, Peter; The Answer to How is Yes; Berrett-Koehler, 2003.

<sup>3</sup> For more on “tame” vs. “wicked problems”, see the work of Horst Rittel

<sup>4</sup> See Forrester, Jay; Industrial Dynamics; 1958 and Sterman, John, Business Dynamics, 2000

<sup>5</sup> See Pegasus Communications for a range of resources.

<sup>6</sup> See Agazarian, Yvonne; Systems-centered Therapy for Groups; Guilford Press, 1997.

<sup>7</sup> You'll notice we frequently use the terms “system dynamics” and “systems thinking” together. Without detailing our rationale here (but contact us if you really want to hear it), just know that when we use the term “systems-thinking”, we're referring to learnings, mindsets and tools from both domains.

So, let's get to it. How does one do that? Said most simply, we continually focus on two things – creating relationship and creating clarity. And we do these two things at six organic levels – with oneself, with another, with one's team, one's organization, one's constituents, and one's ecosystem<sup>8</sup>. And, by focusing on these two things at these six discrete levels, leaders develop six critical, level-specific competencies, as summarized in the table below and explained in the remainder of this article (i.e., please don't try to make too much sense of the table – yet).

<b>Creating:</b>	<b>Relationship</b>	<b>Clarity</b>	<b>Ability</b>
<b>At the level of:</b>			
<b>Self</b>	Grounding in your context, experiencing your system and choosing your role	Internalizing a systemic point of view and taking a personal stand	<b>Leadership</b>
<b>Another</b>	Engaging with others in their passion, their work goal & a success story, and adding value to them	Creating an individual causal map of their goal, their top 3-5 core competencies and their story	<b>Trust</b>
<b>Team</b>	Gathering around shared passions, discovering a positive goal, and describing your shared reality	Discovering and assessing your global goal by understanding that goal's behavior over time; mapping the system as a whole	<b>Innovation</b>
<b>Organization</b>	Sharing the work & worldview with the organization and exploring its implications	Analyzing your map to discover your solution set; assessing the organization's fit with reality	<b>Execution</b>
<b>Constituents</b>	Engaging constituents, helping them to shape their identity and define what they seek	Formulating a viral strategy for execution at the constituent level	<b>Scalability</b>
<b>Ecosystem</b>	Giving critical stakeholders a voice, demonstrating your strategic understanding and adding value	Integrating stakeholder goals, needs and value exchange via a thoughtful, balanced stakeholder assessment	<b>Sustainability</b>

<sup>8</sup> Ideally, we extend this to creating relationship and clarity about relationship to one's environment – the environment. And, in many cases – though not enough, groups take it this far.

Some explanation.

**Relationship** is that ability to come to know one with a degree of intimacy – oneself, another person, a team, an organization – to come to an internalized appreciation of what another is attempting, regardless of whether or not they succeed or fail at it – regardless of how it impacts you or your agenda. From this place of intimate, personal understanding – from this connection from the center of one “world” (yours) to the center of another (theirs), 360 degrees of possibility come into view – a view that is unattainable when one simply stands outside a circle looking in.

**Clarity** is what emerges when complexity has been aggregated, integrated and simplified down to its fundamental, most essential components and interactions. What emerges from this is a set of very simple, very complete conversations that, when taken as a whole, combine to explain 360 degrees of experience – a complete and meaningful explanation of “the world” as the collective “we” of the system see it, feel it and know it.

**About the levels.** They’re not rocket science – obvious actually – but, then, that’s the goal of our work – to reveal the obvious in the heretofore obscure. And yet, in practice, they work remarkably well. In keeping with our style, they’re very simple, very intuitive, easy to understand and to talk about.<sup>9</sup> They represent a nested, interrelated and natural set of building blocks for creating connections between people, their ideas and their experiences. (And, we recognize that they are an abstraction – and use them accordingly.) For example, to the degree that an individual has a strong sense of self (i.e., relationship with self) and knows what they are trying to accomplish in the world and how (i.e., clarity about self), they are in a much better position to interact with, contribute to and/or influence others – other people, teams, organizations, etc. And, oddly enough, we’ve seen that getting clear – especially by oneself – is often problematic. It’s as if, for many of us, that it’s through interacting with others that we become clearer ourselves. And, correspondingly, for others it is often in their interactions with us that they (people, teams, organizations, etc.), in turn, become clearer. This iterative process of ideation and creation is, like simple language, highly underrated – often seen and admonished as a waste of time. And, if done in an unstructured or

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<sup>9</sup> By the way, being easy to talk about is often underrated, yet it’s really important when you’re trying to create relationships in large, complex systems or scale an idea across an organization, market or society.

unfocused way, it is. But, with the right focus, structure and process (i.e., systemically and collaboratively), this organic way of building relationship and clarity can be incredibly effective and efficient – preparing a team or organization to move and adapt organically to changes in their environment with remarkable speed. (Remember, the team in Guatemala established such a level of relationship and clarity with an investment of only seven days.)

**A deeper look.** Now a dip into the nitty-gritty – not the whole thing – yet – you’ll see plenty of that in the next section specifically about Guatemala’s process. We first want you to have clear overview.

The chart above is laid out in the order it is because, generally, that’s the way we work – generally. As we’ve said and you likely know – this process isn’t linear – nor are the issues we deal with. All of this is interrelated as one system – exists as a whole, not a bunch of parts. Still, we have the greatest success when we begin with building relationship at the level of the individual and then proceed to evoking individual clarity, using all of that to build relationship and clarity with another, then with a team, etc.

**Self.** Hmmm? Well, this is about seeing yourself in an almost impersonal way – a paradoxical concept – but, then, “selves” are. This process begins with “me” – literally – when I (or you) engage with a new group of people – a new company, community, organization – any new system. “I” have to get “myself” into relationship with this system and get clear about “my” self in the context of this system.

**Relationship with Oneself.** We see getting into relationship with ourselves as having three parts<sup>10</sup> – *grounding ourselves in our context, experiencing our system and choosing our role*. The first, *grounding in our context*, means locating myself/yourself in reality – identifying the boundaries of the system with which I’m engaging – of the problem or opportunity I’m beginning to work on/care about – and, then, getting clear about it’s goal – all of this within the reality of time and space. With the Town of Vail, for example, it was caring about how the Town of Vail “achieves and

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<sup>10</sup> These three, and some of the other understandings and techniques we’ve found successful, are borrowed from SCT – Systems Centered Training – birthed by Yvonne Agazarian and developed by group therapists – and in the process of being ported to the corporate world. (see footnote 6)

sustains Vail as the premier international resort and resort community, able to provide premier service at its current size sustainably over the next 5-10 years”. Here, if we wanted to, we could literally walk the boundaries of this system – Vail; reach out and touch each of the members of the system – the merchants, the resort workers, the citizens, the guests – step back and see and hear their interactions within their system. And we could hazard a guess about how the system would unfold over time, given certain initial conditions and likely future events. And we could measure, year by year over the next 5-10 years, whether or not they were achieving their goal.

We humans are experiential creatures. So, there needs to be some way to actually *experience our system* – to become authentically curious about the passions, goals and worldviews of others in the system – to literally walk around in it, seeing, hearing and feeling what serves the system and what doesn’t. Executives of a Global100 company, for example, were paired with customers on the lowest rung of the economic and social ladder as they explored an emerging market possibility – following them through their day as they tried to engage in, what for most of us, are everyday economic transactions. These executives experienced how a population with a strong work ethic, strong sense of family and community, and strong moral values were consistently misled, lied to, even cheated by that part of the business community that currently “served” them. This experience of another human being epitomized their system and gave each of the executives both a cognitive and emotional, uniquely human, point of reference from which to make decisions – and a passion for making the best decisions. What emerged from this deeply human experience of the “system’s” reality was an individual and collective ability to innovate that would not have been possible from simply “analyzing the data”. Each decision they made was examined in the light of “how/would this benefit Miguel or Juan or Isabel?” “How will this help us keep our promise to each of them?”

Finally, from this grounding in reality, I/you then need to decide – to choose, actually – *what role to play in this/our/my system*. Or, said in a more systemic way, what role does this system that I’ve come to be interested in – or care about or be committed to – need me to play if it’s to accomplish the goal it’s established for itself – this is the “impersonal” part.<sup>11</sup> And, once this is clear, the question/challenge then becomes “do I have the behavioral flexibility required to fulfill that needed

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<sup>11</sup> see Yvonne Agazarian and Systems-Centered Training (footnote 6).

role?”<sup>12</sup>. For CARE – and for us – it became clear to Jim and I, for example, after experiencing a bit of their system, that poverty was not CARE’s problem – it was our problem – and that it wasn’t our role to help CARE resolve poverty – we chose that it’s one of our roles to resolve poverty and that our work with CARE is a vehicle for that.

**Clarity with oneself.** These relational elements – context, experience and role– create the initial conditions for *internalizing a systemic point of view and taking a personal stand*. This comes into clarity when you successfully internalize enough of these points of view to literally hold the system in your awareness – in your nervous system and in your consciousness. And, from this awareness, take a stand for whatever it is that optimizes the system – whatever creates the greatest mutual benefit. Only from such a point of clarity can you help others to see and understand where, how and why the system needs to evolve. And, it’s essential to understand that, while this is a personal stand, it’s not a personalized one, it’s a systemic one – one that sees and appreciates the passions, goals, and worldviews of each of the stakeholders – both individually and collectively. Without such clarity, holding both the individual and the collective concerns, I’m/you’re/we’re simply one more voice among many opting for my “opinion” or “special interest” or “bright idea” – which is usually the last thing the system needs.

**Leadership.** This stand, this point of view, this commitment – rooted in your own personal relationship to and clarity about yourself and the system – provides the perspective you need to influence the system. Most importantly – something that is all too often overlooked in most systems-thinking efforts – you discover a source of energy. There’s an energy that emerges from creating relationship and clarity at the level of self that spawns innovation and fuels the work required to move the system. And you’ll need to (and can) use this energy, this clarity, to awaken a room full of people. You need the requisite variety of a group – the diversity required to create a 360-degree approach to understanding, innovating and evolving the system. Finally, when you’ve sat with this, really soaked in this, you emerge with a distinctly different *state of being*<sup>13</sup> –

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<sup>12</sup> One of my early teachers in leadership and organizational change, Gary Koyen, would consistently challenge us with the question “do you have the behavioral flexibility needed to evoke the change the system needs?”.

<sup>13</sup> Heidegger is one who speaks (at length) about the importance of this – that all humans action (even “being”) takes place in the context of a “for the sake of what” – some overriding purpose or reason for doing – and that the power of the individual is directly related to the power of this FTSOW. We’ve definitely found this to be true in our work – that the

something that's essential to how you show up from here on out – something that influences each of the other individuals in the system – and, through that, the system as a whole.

**Another.** Creating authentic relationship with another at the level of intimacy<sup>14</sup> required to create shared clarity is an incredibly rich experience for both the interviewer and the interviewee. For almost everyone we've worked with – from CEO's of F100 corporations to police and firemen in small communities to leaders of governments and NGO's, alike – we've found that what they deeply care about isn't actually "personal" at all – isn't simply about them – isn't ultimately selfish. They almost always care about something much bigger than themselves or their families or their friends or even their organizations. They care about something that benefits "the whole" – whatever that whole – that larger context – is. And, most often, the reason it doesn't look like they have that deep level of caring is that they're trying to solve a fairly complex problem for a set of diverse stakeholders with unique, complex needs. And they simply don't have the right toolset for doing that. And they don't even know if it's possible – hence some of the really awkward, even ultimately foolish, decisions we see from time to time. It is, however, not only possible but essential that we, as leaders in systems, learn to sit with another human being and really understand them – deeply – at a level that enables us to speak from their place in the system – from their perspective – while not losing our own perspective and experience.

**Relationship with Another.** We've found three things to be particularly valuable and efficient in getting to know another person in a system quickly – *engaging their individual passion for the system, understanding the goal they're currently pursuing, and understanding, with precision, how they work to achieve that goal – based on their best success stories.* Almost every time we've done this, we've added value to them – a level of personal and professional clarity they've rarely experienced before. And we leave the conversation with mutual respect and a strong, intimate relationship.

*Engaging in their passion.* In Guatemala, for example, after setting the context for our one-on-one interviews, we simply asked our partner in the interview – this representative of a particular

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power of an individual leader is directly related to both the power of what they're "about" and how they are in relationship (Heidegger's "social nature" of humankind) with their colleagues and constituents.

<sup>14</sup> You have no idea how much fun working this way can be - or maybe you do!

stakeholder group – what they most wanted to see happen for their fellow citizens in Guatemala. The answers – from military leaders, from educators, from businessmen, from former government ministers – from across the spectrum – where thoughtful, compassionate, authentic hopes for the well being of all of Guatemala’s citizens. And they were clearly passionate about their hopes as they described for whom these dreams were important and why – as they described what must happen if Guatemala is to fulfill her potential. Once we’ve gotten clear about this together – once they’ve recalled it and shared it and I’ve heard it – we have the foundation for our shared relationship to the system – a point of reference for what we will work toward – what must be included – if we are to work collectively to improve the system.

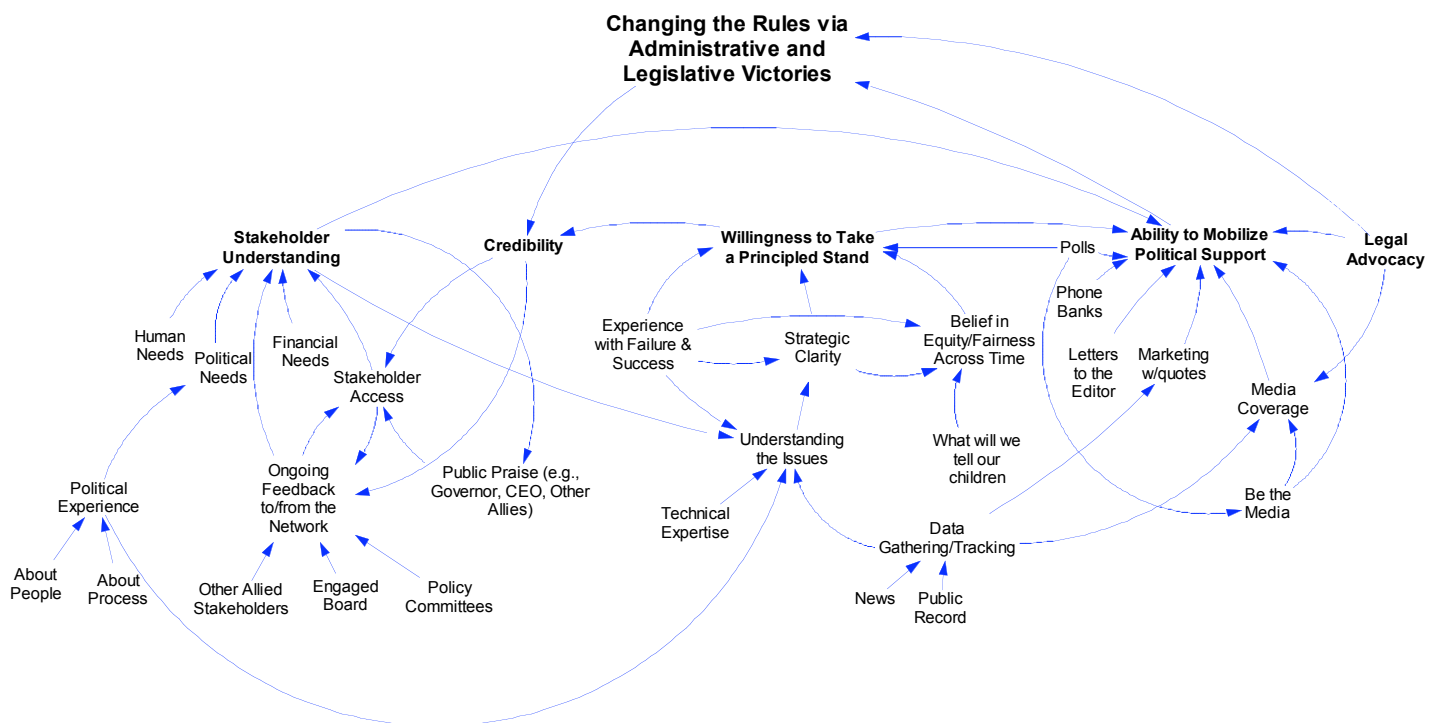
**Timeout.** I need, at this point, to bring something into sharp relief. Remember that “*state of being*” thing that we talked about earlier. State-of-being lives at the heart of all of this. My/your ability to enter into relationship with genuine curiosity about another and authentic, transparent presence is essential to the success of this. We sometimes shift into this state by asking ourselves “how can I become fiercely curious in what this person is interested in and good at?” or “how can I fall in love with what this person cares most deeply about and spends their life doing?” It is from this place – this attitude – the chosen belief that this person is operating from a place of intelligence and positive intent – that meaningful, generative conversations emerge and shared understanding – and, often, alignment – begin. Achieving this state and maintaining it – throughout the work with the system – has become a practice that I doubt I’ll ever outgrow.

*Understanding their current work – their goal and how they do it* – is just plain fun to do – if you come to understand it through one of *their success stories*<sup>15</sup>. People love to tell these stories and they’re almost always meaningful, even fun, to listen to. And you learn an incredible amount about how they do what they do – if you listen from a systems-thinking perspective. So, an essential bit about systems-thinking...

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<sup>15</sup> For more on the power of this, either in one-on-one relationships or large scale systems change efforts see David Cooperrider’s work on Appreciative Inquiry.

**Clarity with Another.** This takes the form of *building an individual map of their goal, their top 3-5 core competencies and their story* in the form of a “causal diagram”. System-thinking has a lot to teach us about achieving clarity. We (the system-dynamics/systems-thinking community) know, from building thousands of system models that, by and large, there are only 3-5 things that directly cause a goal to be achieved. There may be 20 or 50 or 100 things that, collectively, cause it – but those other 15 or 45 or 95 things aren’t directly responsible – they drive the 3-5 things that are. Here’s an example of a relatively simple causal diagram that captures one leader’s story:



Here’s a quick primer on how to make some sense of this (don’t worry, we won’t walk through the whole thing – just enough to get you started<sup>16</sup>). It turns out that, though this wasn’t what their vision or mission statement said, the goal of this leader and their organization (based on their best success stories) was actually “changing the rules via administrative and legislative victories”. This is accomplished (or caused by), at the highest level, five critical resources or abilities –

1. “stakeholder understanding” (i.e., the level of understanding of the stakeholders involved in the issue);

<sup>16</sup> For more on reading causal diagrams, simply google “causal loop diagrams” or “reading causal loop diagrams”. Or, go to [www.pegasus.com](http://www.pegasus.com) and search there.

2. “credibility” (i.e., the organization and leadership team’s credibility);
3. “willingness to take a principled stand” (i.e., not taking a stand on each and every issue but only on those issues where a principle of fundamental importance to their constituent base was at stake – and to take that stand based on principles – not a vitriolic stand based in an isolated ideology);
4. “ability to mobilize political support” (i.e., when such principles were at stake, to draw on that “stakeholder understanding, credibility and principled stand to get people “out” and engaged to change the administrative or legislative outcome); and, finally,
5. “legal advocacy” (i.e., using the existing laws and regulations to enforce both the spirit and the letter of already established precedent to bolster their position on a principled issue).

All the other items on the map are critical (i.e., they must be there for their “system” to function) but they are supportive of (or cause) these top five to, in turn, cause the goal.

The significance of this is twofold. First, it makes understanding complex things much simpler when you can sort them based on their degree of influence – are they primary or secondary or tertiary, etc.<sup>17</sup> Secondly, if you are to influence a system, understanding *causality* in the system is particularly useful. Knowing what pushes on what and in which direction and what other things are then affected helps you see where you should intervene in a system – if you are to have the desired result with a minimum of negative unintended consequences. This requires some skill in thinking systemically – in actually building models that really work – because, as you’re asking these questions about their success story, you’re doing so either from the model you’re building in your head as they talk or from the blank spaces in that model that you need to fill in. And you’re reflecting your thinking back to them – first, to validate (or not) your emerging model of how they do what they do and, second, to let them know that you do, indeed, understand them. When you’re done with your initial conversation, you’ll be able to summarize their success story in a few simple sentences that captures the depth and breadth of what they do with an understanding and clarity that usually hasn’t existed for them before – in a way that captures and clarifies just how much

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<sup>17</sup> BTW, many leaders we work with – even at the Fortune 100 level – simply can’t clearly articulate (initially) their primary goal, much less the top 3-5 things that make that happen. Oh, they can tell me that it’s market share or shareholder return or profit – but these are usually abstractions of their true goal – necessary but incidental metrics – not their true goal. Simply helping leaders get clear about this is a tremendous *value add* to them – and to your relationship with them through your demonstrated ability to engage them in a brief conversation that helps them get clearer at both a strategic and even tactical level.

value they add – and, in doing so, add value to them. At the end of this process of relating and clarifying, we render, based on their success story, a small, clear, complete “map” of their unique system – their goal, their top 3-5 core competencies and the handful of other elements that make up their success model – one they can understand, modify and validate (and, by doing so, you’ve actually given them their own, personal primer on systems-thinking). For most, this is the first time (often in a 20 year history of doing what they do so well) that they have clearly articulated what they do and how they do it. It’s a tremendous value add for them – and for our relationship.

**Trust.** This ability to clearly see, understand and restate what another person is about evidences that your curiosity is authentic – that you actively listened and really “got” them and their work – their world. And, in the process, you build trust – the trust that comes from caring enough to really understand someone else’s perspective – to really live in it – if just for a bit. But this “bit”, constructed in this way, stays with you – both of you. Building trust at this level is particularly important because 1) it ‘s so essential to successful teamwork and 2) it’s often difficult to initiate trust building at the team level because of the competition between goals, ideas and action that exists at the level of team. Doing this part well at this one-on-one level builds a resource of trust – each individual’s trust in the process and in you – a resource that you can draw on when you begin the work with the team as a whole.

**Timeout.** So, where are you (and the others) now in your process. Well, you’re each clearer and in stronger relationship with yourselves – at the level of self – with what’s important to you and motivates you as an individual – and what you’re good at. And, you’re in strong, appreciative<sup>18</sup> relationship with each of the others and they with you. And, now, each member of the group can speak with clarity and passion about that – can actually engage in a meaningful, well structured, precise conversation about what they care about, what they do and how they do it. They’re ready – and you’re ready – to engage as a team.

**Team.** Now you lose “control” – as if you ever had it! Teams are smart – especially if you’ve been smart – if you’ve set them up to be smart. I/you can’t tell a team what to do or even how to do it.

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<sup>18</sup> Again, see David Cooperrider and Appreciative inquiry.

You can lead a team, but you can't really push or drive a team. Teams take a bit of time. Teams have to form their own relationships and find their own way<sup>19</sup>. But you can do is design a good process – a good structure – a good container – within which a team can find themselves and their way. And that's precisely what good systems-thinking tools coupled with good collaboration processes do. And, if we do our job well, the team itself will begin to guide the process – they will become a force of their own, correcting us when we drift of point and monitoring individual<sup>20</sup> and group behavior and alignment toward their chosen goal. At this level, the lines between purely relational work and purely clarifying work begin to blur. So, from time to time, now, we'll talk about them almost as if they are a continuous whole – which, if we're doing our job well, they are.

**Team Relationship.** A word here about something critical to good relationships – choice. While we offer authentic choice at each level of our work, we do so much more explicitly here. We allow people choice – not just choice for the sake of choice – but choice about things that they are truly, deeply interested in or passionate about. Most people we work with are deeply passionate about what they do – even if the systems they operate in have stymied their ability to act on it and dulled their enthusiasm. We offer them choice by allowing them to *gather around their shared passions, discover a positive goal, and actively engage in their reality.*

A critical part of building relationship at the team level is allowing the individual members to *gather around shared passions* – a practice that derives from the SCT concept of “functional subgroups”<sup>21</sup>. As you'll see in the next section, the single most important thing to create for the team is a *shared positive goal*. Without that, we have a group – but we don't have a team. In order to discover that, we begin, using the data from our individual interviews, to determine what the passions – and, therefore, possible goals – for the team could be (usually 3-4) and then engage the group as a whole in conversations to clarify what subgroups, in fact, exist. Then, each

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<sup>19</sup> The best source I know on dealing with really smart, really challenging teams is, again, the SCT work developed by Yvonne Agazarian. (see footnote 6).

<sup>20</sup> It continually amazes me how a group can handle difficult personalities – once the group is clear and aligned. Time after time, we see a group – often originally intimidated by a dominant personality, bond around a particular purpose to such a degree that they simply won't let themselves be distracted by those in the group who attempt to deter them. Once the group has reached solidarity, it's then fascinating to see that formerly dominant member begin to self-manage in order to remain a part of (or re-join) the group.

<sup>21</sup> Properly structured and led, functional subgrouping, when coupled with systems dynamics tools, enables a team to experience and learn collaboration as they work. In the end, people know how to collaborate without our even mentioning the word, outlining the steps or “teaching” them collaboration.

subgroup convenes and determines, first, what their goal is and, secondly, what they think the larger systems goal should be – holding in mind both their perspective and the needs of the whole. For example, for a group of 24 stakeholders working on renewable energy in the Midwestern U.S., they were passionate about four things – the environment, energy policy, local economic development and the electric utility industry. We offered these up as subgroup meetings that any member could attend and allowed them to attend as many subgroups as they wished – requiring only that they be genuinely interested in the subgroup topic. This insistence on “genuine interest” (vs. being assigned to a group) ensured that every participant would be fully engaged, fully contributing to the work of the group – from a place of personal interest, expertise and/or passion. And, because everyone was fully engaged, we were able to quickly get to a shared positive goal and *engage in the reality of that goal* via a fact-filled conversation about the behavior of that goal over time. When we structured their conversation using System-thinking tools (see “clarity” below), the results were quite remarkable – emerging with a revolutionary goal – to reduce green house gas emissions by 80% by the year 2030. This was a goal that, though no one in the group of 24 participants (including scientists, attorneys, and utility industry professionals) would have chosen it in the beginning. By the end, they unanimously understood, agreed to and passionately supported their radical goal as essential to the well being of the whole system and the planet. Today, just two years later, that goal is being discussed on nationally televised policy debates.

**Team Clarity.** The first essential to gaining team clarity is to *discover a positive goal*. A word here about positive goals. We, like Robert Fritz<sup>23</sup>, insist on a positive goal. When we first began to work with the CARE Guatemala team, they had a “negative” goal<sup>24</sup> – i.e., the elimination of poverty. When you think about it for a moment, negative goals are usually an attempt to remove obstacles to a much more motivating, desirable and collectively sharable positive goal. In the case of Guatemala, if you consistently ask the question “when you eliminate poverty, what will that get

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<sup>23</sup> Robert Fritz has written and taught extensively on the creative process – especially in organizations. For more on his work, see [www.robertfritz.com](http://www.robertfritz.com) or [The Path of Least Resistance](#).

<sup>24</sup> Neuro-Linguistic Programming has something to say about “positive/negative” goal orientations. They offer (and, based on experience, we tend to agree) that individuals are of two primary types – fundamentally orienting toward something (i.e., positive goals) or away from something (i.e., negative goals). And, while we do seem to see this in our work with teams and organizations, we’re not convinced that such an orientation is a permanent condition – believing that every individual does, at some level, have something they are “for” to orient toward – something waiting to be discovered and declared.

you?”, you eventually come up with (and they did) a very different goal – in this case, economic self-determination – a goal that includes but significantly transcends poverty elimination. Additionally, when they began their larger conversation with the rest of the Guatemalan Society, their goal of poverty elimination had few powerful and/or committed advocates at a national level – there just wasn’t much enthusiasm, in our opinion, for “poverty elimination”. But, the goal of “economic self-determination” garnered serious and enthusiastic support from the rural communities, the education sector, the business sector and policy sectors – even the military leadership. And, quite quickly, the larger group of 30 stakeholders from across Guatemalan Society came into shared agreement that this was, indeed, their goal, too. CARE is now an actively sought out participant in a variety of national-level conversations about the future of Guatemalan Society – something previously unheard of in their 47 year history of work in Guatemala.

In order to ground and clearly define this positive goal, we more deeply explore it in a process we call a *global goal analysis* – i.e., an examination of that handful of resources or abilities that directly effect the primary goal of a system. True to system dynamics, if the goal is “economic self-determination”, then there must be only 3-5 things, at the highest logical level, that directly drive that goal – that cause it. This rich, enlivened conversation not only gets at the heart of those 3- 5 things – something essential to the ability to eventually achieve it – but clarifies, for the team as a whole, specifically what we mean when we say “economic self-determination”. This conversation among the members of the team both clarifies and deeply embeds the fundamental meaning of their goal. Ultimately, in Guatemala, they realized that economic self-determination was, for them at this early stage in their thinking, a function of “liberty”, “equality” and “solidarity” – universal qualities that inspired both them in their work and inspired those they approached to join with them in working for economic self-determination.

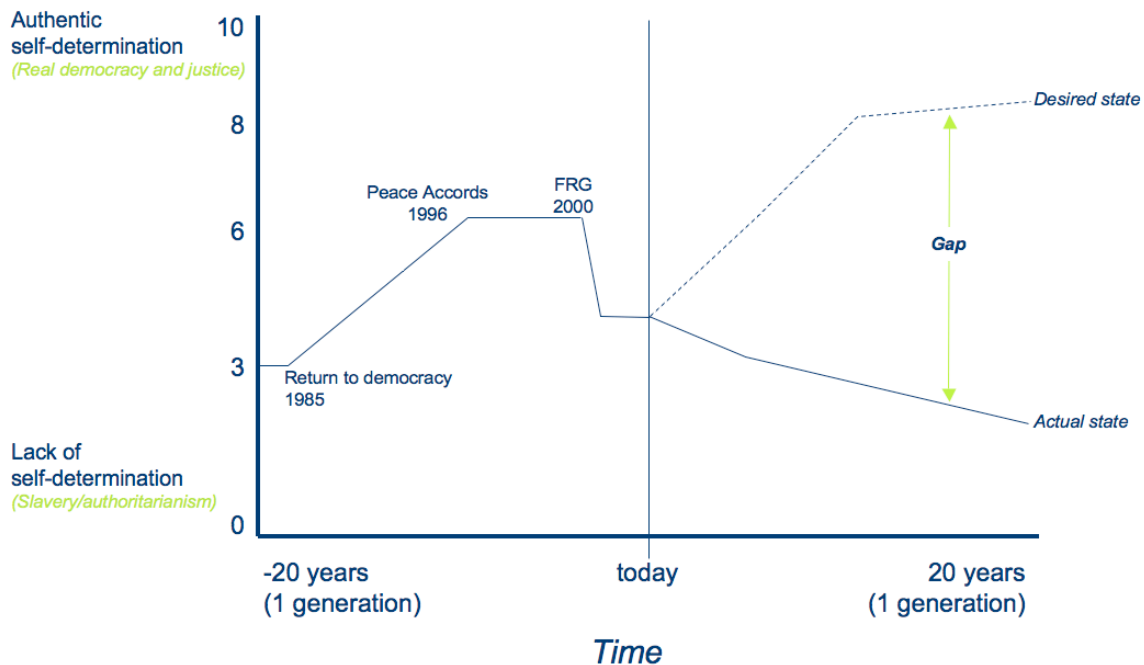
*Behavior over time* (BOT)<sup>25</sup>. If you want to change the condition of a system, especially as a team, it really helps to come to shared agreement about how it’s been behaving over time. Is it trending up or down? From a high point or low point? Is it stable or erratic? And, since the system’s goal (which, in fact, defines the system) is usually new to the team, they generally have no explicit

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<sup>25</sup> For more on behavior over time graphs (or reference behavior patterns, as they’re also known), see Jim’s book (footnote 39) or google the term.

agreement, yet, about how it's been doing. This process (see figure 2 below) allows the team to come to agreement about the ideal state of the goal, it's current state, and it's likely future state over a time period that has relevance to both the team and the system. In order to collectively chart the behavior of the goal/system over time, the individual team members engage in a free-thinking conversation to 1) exchange a broad and rich array of data about the system at each point in it's development – making explicit both facts and assumptions about their shared system and 2) agree about how to reflect that information on the chart – i.e., they have to collaborate. By the time this is complete, they have come to shared agreement and understanding, not only about the behavior of the system over time, but about the magnitude and direction of the change they must, as a team, evoke – if they are to achieve their systemic goal.

*Ability to self-determine  
(develop my own potential)*



A bit about interpreting their behavior over time graph. Once CARE realized that their true goal was “economic self-determination” (and that it was a function of liberty, equality and solidarity), we had to further clarify it by defining the endpoints – by agreeing what it looks like when you have it (“real democracy and justice” – what they are aspiring to cause/create) and when you don’t (“slavery and authoritarianism” – what many indigenous Guatemalans had experienced, in one form or another, for much of the last 500 years). Next, we needed to determine what “one full cycle” of activity in

that direction would look like – i.e., how long does it normally take for concerted action toward that goal have an effect. Those in the room decided that changes in the state of that goal had a “generational” cycle or rhythm. Once that was determined, our job was to agree about the path that “economic self-determination” had taken over the last 20 years. What unfolded during that conversation was rich exchange of information (actually, of data) supporting the different perspectives on the fate of their new goal over time. Before any one point of view could be charted, however, the group had to do two things – come to agreement (i.e., true consensus – not compromise) about 1) the state of the goal at a point in time and 2) the cause for any changes to that state at each inflection point in the graph. By the end of that conversation, the group had experienced how to explore and validate (or not) their opinions by aggregating and integrating their previously fragmented perspectives about the state of “self-determination” in Guatemalan society. Once they’d worked up to “today”, we offered an observation and asked a tough question. The observation: “the path of the system includes the fact that you’ve been raising more and more money, hiring smarter and smarter people, doing better and better projects, getting better and better results, and yet the state of “self-determination” is getting worse and worse”. The question: “given that this is a system – an “amoral beast” with significant “momentum” that will cause it to want to continue to respond as it has historically, what is this system likely to do going forward?”. With just a bit of discussion, they all agreed that, without some significant change, the system would continue to perform as it had – i.e., the downward trend of “self-determination” would likely continue. This realization was a somber moment for the group – the realization that, without intervention, the condition of “self-determination” would fall to pre-revolutionary levels. The fact that it was a shared realization made it even tougher to deal with. So, we now had to ask, “given what the system naturally seeks to do, what must happen by when if you are to prevent this most undesirable state?”. What then emerged was another spirited and brief conversation in which they all agreed that there must be some immediate indication that “self-determination” was going to get better, that it must improve sharply to an acceptable level over the next 8 – 10 years, after which the rate of improvement could begin to level off – though still progressing toward the ideal.

Now, we had a complete and reality-based image of the state of that thing – that goal – to which they were all committed. It was a challenging realization – one that captured the paradox of what would “naturally” happen if the system was left unchecked and what must happen (though the how

was not yet identified) if this worthy goal was to survive. We then pointed out to this leadership team that their task as leaders was to internalize this paradox – these two “poles” – that fixating on one pole (the lower) had previously been the role of the cynics (the “pragmatists” as they preferred to call themselves) and fixating on the other pole had been the role of the idealists (the self-declared “progressives”). But, that the level of true innovation needed to alter the path of this system would only arise from the dynamic tension that exists when one successfully internalizes this paradox. So, a bit now about innovation...

***Innovation 101.*** When the team as a whole can clearly see the often stark distinction between the behavior the system will likely produce and the behavior they, as leaders, want to and must elicit from the system, they experience a state of what Fritz calls “dynamic tension” – an internalized tension, reflective of external reality – that naturally seeks resolution. Usually, the startling shared clarity of the magnitude of this gap renders the traditional means of solving the problem moot. Traditional organizational “fixes” are simply inadequate. It is out of this gap, and the collective recognition that there is such a gap, that the requisite level of creativity emerges. From this internalized state of being – this recognition of what is and, yet, what must be – the team as a whole commits to using truly innovative processes to solve the problem. For example, with the renewable energy team, they initially said that solving their problem required that they be “impatient, open-minded, focused, respectful, disrespectful, realistic, opportunistic, and visionary” – the traditional list one gets as a facilitator in many processes. Yet, at the conclusion of this exercise – from this entirely new, collectively shared perspective – they identified, among an impassioned (as evidenced by their voice tonality and dynamic body language) list of behaviors, the need to be “panicked, aggressive, fearless, creative, disruptive, crazy, unreasonable, unrealistic, unapologetic, risk tolerant” in achieving their goal. There was a palpable shift in the energy in the room – in the commitment, enthusiasm and determination of the group, as individuals and as a whole – a shift that they sustained throughout the 6-month process of our work and beyond – a shift that led them to innovate in truly unique, ingenious ways. But, to be truly innovative, we still need a critical element – shared agreement about how the system that drives/determines this goal actually works – in the form a “map”.

**Timeout.** Time to clarify something. Remember earlier when I said that we “generally” work in the order of self, another, team, etc. Well, a bit about “generally”. Which level we engage with next – beyond the level of team – depends on the team’s decision regarding where to intervene to effect the needed change – i.e., what are the boundaries of the system we are trying to affect – is it the team, organization, market, etc. Once we’re clear about that, we focus on that level, bringing the work at the next levels – with Organizations, Constituents and the Ecosystem to bear on that system. For many of our clients, the primary intervention takes place at the level of their *organization* – helping them to understand that system as one that evolves (or not) in response to their larger environment. For the renewable energy group, it was a *constituent* perspective that helped them to see the energy system as a set of relationships between clean energy advocates, the political and judicial systems, local economic development, the environment, and utilities. For a corporate client, it was an *industry* map – helping them to understand the structure of the digital music industry as it impacted their corporate strategy. For Guatemala, it was a *social* map – understanding the roles and interrelationships among rural development, the peace accords, education, the Mayan movement, the military, the women’s movement, local markets, national defense and poverty studies – among other sectors. So, though we’re writing linearly here – unfolding our story conceptually as if we move from Organization to Constituents to Ecosystem – in practice, the process is often iterative. We may well need to jump out to the level of Ecosystem, do individual interviews, build and validate a societal map, and then jump back to the level of team (so they can interrogate, modify, validate and internalize their map – their system), then move on to the Organization (where they must develop the ability to execute as an organization), then to Constituents (where their interactions with reality actually take place) and, finally, back to the level of Ecosystem (that larger system which many of them, in the end, are seeking to influence) to measure the impacts of their work.

*Mapping the system.* Getting clear about the team’s shared positive goal enables us to determine the level of the intervention – the boundaries of the system in space and time – that determine the fate of that goal. And, we can create a systems map that represents that world. When we say “map”, we’re referring again (as we were at the individual level) to a causal diagram – a word and

arrow diagram of the system – one that represents its goal, how it achieves that goal, all of its parts, the interactions among all of those parts and the effect of those interactions on the system (and stakeholders) as a whole.

So, how do we develop this map in a way that represents “reality” – at least the shared reality of those involved in the process – the participants and key stakeholders? We do it in those individual interviews – and their accompanying individual maps – we described earlier. In any systemic engagement, we interview the key stakeholders in the system – those individuals who have credibility in and knowledge of the system in the eyes of the other stakeholders in the system. In those interviews, we ask them about their goal/vision for the system (be it their Organization, their Constituents, their Ecosystem or even the environment); their current work goal, and how they work to achieve that, as revealed in one of their success stories. When we do this, we’re basically asking them about their mental model of reality<sup>26</sup>. We all have and operate out of our mental models – our incomplete representations of reality. We just rarely make them explicit. Some of the most interesting (and least successful) decisions we make are the result of incomplete, untested, incongruent mental models<sup>27</sup>. When we make these mental models explicit, we can test them and make them more complete and more congruent. This enables them to be 1) communicated as clearly and simply as possible, 2) shared with others – and enriched by the questions and insights of others and 3) utilized to make better, more congruent and more successful decisions. Once these individual stakeholder maps/perspectives have been validated in this way, we can then combine these individual maps into a single, integrated systems map. Invariably, when we do this, all of the stakeholders are able, for the first time, to see their whole “world” – all of its parts, the interactions of those parts, and the impact of those interactions on the other parts (and people) of the system. These systems maps – these complete, congruent and validated shared representations of reality – form the basis for evaluating how we will intervene in the system, at whatever level that system exists. The result, then, is a map like the one below.

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<sup>26</sup> For more about mental models see the NLP (Neuro-Linguistic Programming) literature, in particular, Steve Andrea's book *The New Technology of Achievement*, 1996 and any of Robert Dilts' work ( [www.nlpu.com](http://www.nlpu.com) )

<sup>27</sup> For some fascinating examples of incomplete mental models, see John Sterman's book, *Business Dynamics*, 2000.

<sup>29</sup> Again, if you need more on reading causal diagrams, simply google “causal loop diagrams” or “reading causal loop diagrams”. Or, go to [www.pegasus.com](http://www.pegasus.com) and search there.



First, if you spend a bit of time with a bit of it, you'll see that it follows the same rules, logic and flow as the individual causal maps we looked at earlier. For example, if you take the "Ability to Develop Compelling Services, Products & Opportunities" at the far right hand edge of the map, this company had shared understanding and agreement that this was a function of (see each of the arrows feeding into this variable/resource) the company's "K(knowledge) T(transfer) Training & Consulting Ability", their "Understanding (of Customer) Expectations", the quality of their modular "Solutions Library", the "Q(uality) of (their) Enterprise & Channel Partners" working with them on those solution sets and, finally, their own proven "Ability to Execute". Secondly, in the event that a map like this is a bit puzzling in places, please know that that's not unusual. Maps like these are often shorthand for a conversation that has emerged between the participants in the project – intended more to guide "causal storytelling" than to serve as the full and final, standalone definition of their reality.

**Timeout.** A word here about clarity and systems maps. Getting to this level of shared understanding and clarity represents a significant accomplishment for the team members involved in creating it – whether the map is at the level of the Organization, the Constituents or the Ecosystem. So far, they've listened to each other's stories about their part of the system in the form of a small systems map, inquired about and even modified those maps – even modified some of the assumptions about their goals, and presented their own maps – and engaged in a rigorous conversation about the validity of their perspective of their world – and the worlds of others – and how all of that works in reality. This level of structured conversation – where a team can actually come to agreement and understanding about a complex system – its goal, how it achieves that goal, all of its parts, the interactions among all of those parts and the effect of those interactions on the system as a whole – is a very rare thing. In almost every case, each team member now sees things about their organization that they hadn't seen after 5 or 10 or 20 years of working in the company. This happens time and again in organization after organization. It happened for the participants in the Guatemalan project – for doctors, lawyers, economists, political leaders,

educators. Across the board, they understood, for the first time, how the different interests in Guatemalan Society impacted, for better and/or worse, one another and the system as a whole. And they got to that understanding through a series of fairly straightforward one on one conversations where each stakeholder's world was presented to the participants in small group conversations where the initial understandings (or misunderstandings) about a segment of Guatemalan Society was explained, discussed, debated, modified and validated by that small group of 3-4 people. And this was repeated until the systemic understanding stabilized – until we all agreed that this accurately represented Guatemala.

**Innovation 201.** The insights gained from the systems mapping process come in two forms – the conversations that create and validate the map and the map itself. Probably the most beneficial and transformational are the conversations – although the value of the map itself can't be overstated. Especially in the validation work, opinions, stories, examples and data are shared as the stakeholders work to ensure that 1) their perspectives are accurately represented in the map and 2) that they truly understand the perspectives and dynamics of the other aspects of the system that affects them and their goals. This ability to see, converse about and contain the system – this ability of the map to literally “hold” the conversation – enables, often for the first time, sane, well-structured and productive conversations about a complex, usually misunderstood issue. These insights, coupled with the sense of urgency and vitality<sup>32</sup> that emerges from the realizations in the behavior over time graph, combine to form a robust platform for innovation – innovation that resolves problems at their source – as opposed to a solution that addresses only the symptoms, rarely the root cause, of the issue. For a planning department in a world class resort community, their systems map alone was enough to enable them to resolve a serious internal conflict – one that had grown to the point that employees were coming into the office on different shifts simply to avoid interacting with one another.

**Organization.** Almost by definition, a team, even a leadership team, can't pull off a systemic goal alone. It requires the combined capacity and cooperation of an organization – often a whole system. Generally, the next step in that direction is to work with that aggregation of teams called

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<sup>32</sup> For more about the vitality available in the face of (and because of) impending mortality, see Peter Koestenbaum's and Peter Block's [Freedom and Accountability at Work](#).

“an organization”. Just as the team must emerge from their process with the ability to innovate, the organization must emerge with the ability to execute.

**Organizational Relationship.** The leadership team has been through quite a bit by now – individual interviews, individual clarity, discovering a team goal and agreeing about how that goal is behaving over time, and, finally, mapping their system. And, as a result of all of that, understanding what will likely happen if they don’t intervene in a radically different way – and, usually, soon. And, now, they need to be able to act as a collective to address that. In most cases, that requires an organization. And, if they are to mobilize an organization at the same level of clarity and effectiveness that they, themselves, need to exhibit, they need to cause for the organization an experience and understanding similar to their own. This is where the system calls upon this leadership ability to engage the organization in understanding 1) why they must change, 2) specifically what must change and 3) whether or not this call for change is real – actually grounded in reality – actually something the leadership team is committed to carrying out – something measurable that they will hold themselves and others accountable for. Now, the leaders – demonstrating their collective understanding and alignment in their speech tonality, in their facial expressions, in their body language – must begin *sharing their work and worldview with the organization, exploring the implications, and assessing the organization’s fit with reality.*

This begins by simply *sharing their collective story* – their intellectual story, their emotional story, their personal and professional story – in large and small meetings throughout the organization. It’s viscerally different for an organization when this happens – when leaders speak authentically – when they share their human vision of what could be – when they make an honest, stark assessment of what is – and when they talk about their commitment to closing the gap between the two via a mutually beneficial, inclusive process – and when they talk about the implications (both personal and professional) of not closing that gap. This level of honesty and clarity establishes a foundation of leadership that others, both internally and externally, can rely upon as they take on the difficult task of evolving the organization to meet its new role. When the leadership team of HP’s printing division shared their collective story at a meeting of their top 200 leaders, there was a marked shift in the attentiveness, the curiosity and the bias for action of the top 200 when their leaders spoke authentically from their own personal experience regarding the implications of the

clearer view of their system that they had created and how that had meaning for them personally. Here it becomes clear that people don't mind being led – throughout history we've all celebrated and supported truly good leaders. We mind – we disdain – we revolt (through action or inaction) against being misled. This leadership act of personal and professional transparency, coupled with the authenticity and clarity that comes from collaborative systems-thinking – when displayed across the full leadership team – becomes the template, the model, the genesis for the organization as a whole – a model they (at least the “they” in the organization that can be influenced) immediately recognize as valid – one they can internalize, translate to their own unique set of responsibilities and use to execute on behalf of the system as a whole.

This internalization happens in two ways. First, when the leaders themselves walk people through the map – illustrating ideas, relationships, issues and understandings with real world stories gleaned from the interviews or refined in the conversations that validated the maps, their collective story comes to life. The give and take that occurs here – the personal contact, passion, and clarity that evidences itself via these conversations – the willingness of a leader to listen, hear and consider the opinions of others – anchors both the team's collective story and the map itself in the organization at level of the individual. Secondly, when each individual is allowed the opportunity to *explore the implications*<sup>33</sup> of this systemic perspective on their personal and professional lives – allowed to make their own decision based on their own considerations about the impact of the leadership team's intention on their individual part of the system – they can more deeply internalize their new reality. All too often we ask individuals for their commitment without acknowledging that such commitments effect<sup>34</sup> consequences in their lives and on their ability to do their jobs – to satisfy their own sets of stakeholders at their level in the organization. Only by offering them a structure and process for collectively engaging in this evaluation – this consideration – can we rely on whatever level of commitment they offer. Once they've had the chance to consider the implications of their leadership team's shared understanding and insight on their individual work and those they affect, then they can offer a valid assessment of their desire and ability to respond

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<sup>33</sup> I am indebted to the folks at ARC International, particularly Robert Gass, Stan Aldrich and Caroline Fisher, for introducing me to this need for people to explore the personal and professional implications of a change effort as a precursor for actually committing to it.

<sup>34</sup> I do mean effect here, not affect. Making such a deliberate choice to act causes things to change in the world – as in cause and effect. For a transformative deep dive on this from an existentialist point of view, again see Peter Koestenbaum's and Peter Block's Freedom and Accountability at Work, Pfeiffer, 2001.

to the demands of this new understanding about their reality. The commitment that flows from this is not an end in itself but, rather, an indication of the validity of this new path.

**Timeout.** Another word here – this time about collaboration. Never once in this process of “sharing worldviews” did we offer up recommendations or suggests about how to collaborate. We simply worked with the team responsible for presenting the map, helping them to understand how one evokes a clear, unbiased understanding of someone’s mental model<sup>35</sup> about what they are trying to achieve and how they achieve it in order to validate their thinking – their mental model. Then, sharing with them how one explains a small map like that to someone in a way that allows them to understand it, inform it and, once validated, internalize it. This had, according to the participants themselves, life changing effects. Individuals who previously held strong opinions about the motivations and abilities of others in the system suddenly saw “the other” in a new light – recognizing the predominately positive intent and intelligence of others – seeing another no longer as an adversary but as an individual concerned about another part of the system – concerned about other stakeholders and other metrics viewed from other “angles”/perspectives of the system – often unaware of the impact they have on distant parts of the system – definitely unaware of how to “synchronize” the system so as to avoid those negative impacts while still achieving the goals they had taken on. In the end, the team from CARE Guatemala that led this process knew how to collaborate – and not just in their interactions with others. It became a part of their consciousness. They now ask themselves “what might this person see that I don’t see?”, “What might this person be trying to accomplish that I don’t understand?”, “What might this person be able to do really well that doesn’t show up that way because the system is working against them?”. And they know how to collaborate, not because they took a class in “collaboration” but because they engaged in trying to solve a complex, multi-stakeholder problem – achieve a systemic goal – one that they cared enough about to be willing to change themselves in order to accomplish<sup>36</sup> – one that could only be solved through collaboration. And the rigor of the system-thinking tools provided a clear structure for funneling this collaborative inquiry into such a complex issue.

<sup>35</sup> Again, for more on NLP, see Andreas or Dilts (see footnote 26)

<sup>36</sup> I was reminded here of the “definition” of a leader as one who makes a commitment that seems impossible to achieve and then has to change *themselves* at a fundamentally level in order to accomplish it.

**Organizational Clarity.** *Analyzing the map.* A systems map, alone, is not sufficient for intervening in a system. We must deepen our understanding about how the system behaves. Systems have momentum – they tend to keep on doing whatever they’ve been doing. It’s sometimes useful for me to think of a system as an “amoral beast”, doing what it does simply because it’s driven by its goal and its structure – it’s simply doing what it was built (or has “evolved” – often by accident) to do. So, we’ve found it more effective and efficient to apply a handful of system-thinking based assessment tools to the map to more fully understand the system and how to influence it. Applying these different analytical tools is akin to viewing it from different perspectives – literally like picking it up and turning it – allowing the light to strike it at different angles – with each view offering some new insight into its behavior. In addition to the Global Goal Analysis and the Behavior over Time tools, we may also look at the system through the lenses of:

- Trends – how the individual resources (or groups of them) in the system have behaved historically, are expected to behave in the future, and need to behave if the system is to achieve its goal
- Archetypes – those recurring loops in a systems (whether ecological, biological, economic, social, etc.) that cause system’s behavior – akin to getting caught in a riptide – if you know you’re in one, you can safely recover – if not, you’re likely to drown.
- Cross impact matrix analysis – mathematically identifying those resources with the greatest influence – or leverage – in a system
- Stakeholder assessment – an understanding of the goals and problems of each of the key stakeholders and their primary exchanges of value with one another across the system
- Others – including systemic leverage, performance indicators, loop dominance, levels of intervention<sup>37</sup> and AQAL<sup>38</sup> (all quadrants, all levels) – each applied based upon what’s most useful to the key stakeholders.

Regardless of which combination of tools<sup>39</sup> we use, these analyses are integrated and distilled to clarify specifically where in the organization we can most efficiently and effectively intervene to

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<sup>37</sup> For an excellent article on levels of intervention, see Donella Meadows excellent article “Leverage Points: Places to Intervene in a System”, 1999.

<sup>38</sup> For more on AQAL , see Ken Wilber’s work .

move the system as a whole (again, is it at the level of the Organization, the Constituents or the Ecosystem, etc.?) in the desired direction. For example, in the renewable energy project in the Midwest U.S., the analysis distilled, out of 160+ variables, 11 intervention points affecting 4 critical resources that 1) were capable of moving the system in the needed direction that 2) radically changed their strategies of the past 20 years. In Guatemala, we identified 6 intervention points out of 140+, again, radically changing the approach they'd taken for nearly half a century.

*Assessing the organization.* Once we have these three elements – a solid systems map, an organizational resource in the form of stronger organizational relationship, and our systemic analysis – our understanding of the fundamental behavior/nature of the system and how to change it – we can assess the organization relative to this current challenge – assess the ability of the organization to act on their new insight – whether that insight exists at the level of the Organization itself, the Constituents, the Society or even the Environment. And, by now, this assessment isn't that difficult. We already know how to make our mental models explicit (this time, about the organization) using maps; how to inquire about one another's thinking (via collaboration); how to tie relevant data to our conversations (with behavior over time graphs and global goal analysis); how to come to shared agreement and alignment (via inquiry and shared, positive goals). Now, it's simply a matter of putting all of this together to assess the organization's readiness to take on the challenge of intervening in the chosen system. And this assessment, itself, will be aided by some of the same system-thinking tools we've already used. And, by now, we're all sufficiently committed to the goal – both individually as leaders and collectively as an organization – and trusting of one another that we're more likely to make honest, constructive assessments of what we can and can't (yet) do.

**Execution.** Execution happens into two dimensions – internal and external. While external execution focuses on the levels of the Constituents and the Ecosystem, internal execution (i.e., within the organization) focuses on the staff and organizational development required to ensure that the capabilities needed to successfully execute on our goal are in place when needed. The organization's systemic understanding, coupled with their increased collaborative capacity, now

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<sup>39</sup> For more information on several of these tools, see [Managing from Clarity](#) by James Ritchie-Dunham and Hal T. Rabbino, 2001.

enables the organization to make use of many of the tools that organizations, especially businesses, are particularly good at – tools that aid execution – tools for prioritizing, planning, logistics, communications, supply chain management, customer relationship management, etc. Now, however, we’re deploying these tools in the congruent context of a clear, compelling, shared understanding of the systemic drivers affecting our ability to achieve our goal – and the systemic benefits (or impacts) of that goal for the system’s stakeholders.

**The Constituents.** Primary among those stakeholders are our Constituents – those people we hold in our mind’s eye as we assess, innovate, set goals, make plans, and build our organization’s capacity – those people we have expressly chosen to serve through our product and/or service offerings. And, if we are to be of value to them, we need to support them in what they need to have, want to do and strive to be<sup>40</sup>. In short, we need to support them, as they move into and beyond meeting their basic survival needs, in their own development and evolution<sup>41</sup>. Genuinely discovering this requires that we *actively engage with our Constituents, help them to clarify and shape their identity, offering them what they seek*. And, once that’s been accomplished, that we formulate a Viral Strategy for execution at the constituent level.

**Constituent Relationship.** *Actively engaging with our Constituents.* In Guatemala, we not only interviewed a broad representative sample of the traditional stakeholders from government, business and society at large, we paid special attention to engaging with the “customers” – the Constituents – those citizens living in small towns and villages in the interior – visiting places that many who serve these people had never seen before. We met with individuals, families, councils and large groups. We asked them what they needed to have, wanted to do and sought to be. And the overwhelming majority came back with thoughtful, mutually beneficial, largely unselfish answers – systemic answers. And why not – they live in their systems every day trying to figure out how to develop and transform them as a whole. It amazes me that our organizations are, in many ways (though, obviously, in not enough ways), just now realizing how critical it is to actively engage

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<sup>40</sup> This continuum of be, do, have is embedded in our work, emphasizing, as have others before us, the essential order of “having” deriving from “doing” which derives from “being”.

<sup>41</sup> SCT sees humans and human systems as having three primary functions – survival, development and transformation. And, you’ll find that our orientation to this is fundamentally optimistic (a side effect of positive goals) – believing in both people’s desire to eventually transform/evolve and their ability to do so. It’s simply that many of the tools to support people in doing that in an increasingly complex environment are just now emerging.

with Constituents – to enter into an authentic two-way<sup>42</sup> conversation (vs. the traditional one-way advertisement, presentation or speech)<sup>43</sup>. Emerging recognition of this need is the driver behind the customer-facing, customer-centric, customer-inclusive perspectives beginning to become popular. Yet, despite much of the hype, many of these efforts are still veiled attempts to get people to accept (i.e., settle for) what organizations already know how to do. After all, most organizations have heavy investments in hard and soft infrastructures for getting things done – infrastructures that would require change – change that requires additional effort – additional energy we may not want or be able to expend at the moment. But, such change is essential to both the development and transformation of the lives of our Constituents and, if we stop to think about it for a moment, the development and transformation of most organizations – be they the Global1000, CARE International, or the U. S. Congress. In an increasingly aware, interconnected and interdependent world, if, in the long run, we are to survive<sup>44</sup> (much less, to develop and transform), the ability to consciously evolve is becoming a requisite capacity.

These interactions with our Constituents follow the same elemental principles as getting to know another, just at a larger scale. We will still need (even want) to engage with their passions, their goals and their success stories (those they've already experienced and those they're still seeking), and add tangible, measurable value to their world. And, changing ourselves and our organizations to be able to act on what we learn in these engagements can also draw on many of those same collaborative and system-thinking tools – tools that help us to get our mind around the larger system that effects our Constituents – tools that identify the handful of things we need to change (vs. trying to change everything at once) so that we can align the needs of our organization with the needs of our Constituents.

*Helping to clarify and shape their identity.* Here's where my/our struggle over even the concept of *identity* becomes relevant. In our work, we continue to ask ourselves “what is ‘identity’?” How do we define it – even measure it – if we're to be clear enough – grounded enough – to act from it? I

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<sup>42</sup> Thanks, by the way, to Caroline Fisher who, in her thorough and thoughtful way, basically drilled this notion into me – one of the many gifts she brought to me and to my work.

<sup>43</sup> For more on why one-way conversations are still so prevalent, see Richard Brodie's *Virus of the Mind*, Integral Press, 1995

<sup>44</sup> For more on the intersecting complexity of global resource constraints, population growth and inadequate policy frameworks, see Lester Brown's *Plan B 2.0*, WW Norton, 2006.

invite you to ask this of yourself. Are you the things you have – titles, property, degrees, spouses, children? Or the things you do – consulting, teaching, playing golf or tennis or the piano, running, meditating or praying, parenting? Or are you your state of being – calm, supportive, collaborative, aggressive, fierce, centered, sullen, optimistic? As we've worked with thousands of people over the years, one thing has clearly stood out for us – and it's grounded in who people realize they are when they discover it. Almost everyone – whether from business, government or non-profits – comes to discover that they are their commitments<sup>45</sup> – to those people and things they care enough about to give significant amounts of themselves – their time, energy, creativity and other resources. What they're committed to may take the form of children, patients, customers, a forest, a community, a nation, another species, a mountain, a beach, etc. But, at some level, they come to realize that they care deeply enough about something that it drives them, sometimes against all odds, to move forward in life – drives them to live differently – to be different. Viewed through this lens, it becomes clear that all that they have, do and are is a reflection of the strength or weakness of this fundamental commitment. And this commitment or aspiration becomes their identity – explains why they live the life that they do.

As for actually helping to clarify and shape this identity, earlier, we said that it's often through our interactions with others that we become clearer ourselves. Again, many of the same principals we've discussed before apply here – engaging directly with their passions, their success stories, their worldviews – clarifying, integrating and aligning these – adding value to their collective as we/you do so. And, at this level – the level of constituents (of whom, there are hundreds or thousands, if not millions) – helping them to clarify and shape their individual and collective identity(s) at scale isn't really the issue<sup>46</sup>. The real issue is whether or not we engage from a collaborative state-of-being (rather than pushing our own agenda) and apply systems-centered

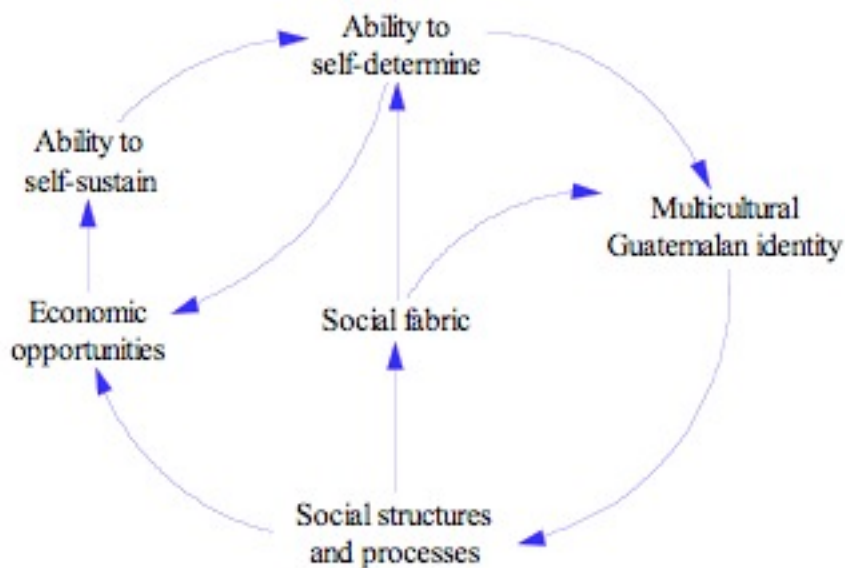
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<sup>45</sup> For more on this perspective, see Richard Strozzi-Heckler's work on somatically oriented leadership – as he might put it (forgive me, Richard), what are you a commitment to – and how is your body (that which is literally you), in structure and function, reflective of that?

<sup>46</sup> There are a variety of methods (e.g., world café, process work, open space, functional subgrouping – even truly representative leadership structures) for bringing large groups of individuals together, processing large amounts of information and coming into alignment in a short period of time; or for gathering data remotely, aggregating and analyzing it; for creating events and opportunities in the marketplace or via the internet that help others to clarify and live into their identity – that which they aspire to and are committed to living into<sup>46</sup>. For 15,000 employees at TXU, engaging in large group conversations about the obstacles to their success, their issues were distilled into a clear, congruent, immediately actionable systems map that clarified who they were trying to become within the company and how to get there via a few simple changes – some of which they could implement immediately, yielding immediate results.

principles and practices that help to clarify and integrate perspectives (rather than to reinforce existing differences). In fact, here, scale can be an asset<sup>47</sup>, reversing the sense of isolation<sup>48</sup> and difference that rarely truly exists to the degree we've come to believe – offering, instead the discovery that we are more often aligned than alone in our fundamental needs, aspirations and commitments.

*Offering them the goal & identity of their choice.* Once a group of Constituents has individually and collectively entered into relationship and described and defined the system that determines whether or not they can create the outcomes they've chosen for themselves, then they themselves need to come to shared agreement and understanding about how to most effectively intervene in their system to develop and transform it into the world they are committed to. Only in this way will the option we're offering become sticky<sup>50</sup> enough to ensure adoption by the group you're trying to serve. For CARE's work with their Constituents, this meant evaluating projects in the context of their strategic impact – i.e., to what degree does a project advance, in their case, their chosen cycle of economic self-determination as they describe it below (see the narrative that follows):



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<sup>47</sup> We're now convinced that, the internet and our increasing interconnectedness enabled a social "long tail" that foster connection, communities and solidarity at a distance around what were once fragmented issues

<sup>48</sup> For more on how this sense of isolation is designed and manufactured, see Noam Chomsky's work.

<sup>50</sup> For more on sticky messages and their role in viral change efforts, see Malcolm Gladwell's *The Tipping Point*.

<sup>53</sup> For market examples, see *Crossing the Chasm*. For social examples, see Howard Zinn's *People's History of the United States*.

This can be read as “as we get clear about our identity, we are able to determine social structures and processes appropriate to that identity. These structures and processes will enhance both our social fabric (which reinforces our identity) and help determine our economic opportunities. These economic opportunities increase our ability to self-sustain which increases our ability to self-determine, leading to a re-examination of our identity – and the cycle begins again.

**Constituent Clarity.** In any change effort, if it is to develop the ability to scale, we need to ask ourselves a series of practical questions that fall into four simple, straightforward domains:

1. **Start.** Where will this change start? Who will start it? How will it start? We should be able to walk out into the organization or the market or the society or the constituent base and touch the person(s), place and/or object where the change begins and describe how this will start. We have a responsibility, as leaders or consultants, when positing a change effort, to think it through to this fundamental, simple level.
2. **Spread.** How will this change spread? How will it move from person to person, place to place – which people and places? Will it spread linearly, exponential, slowly, quickly? Again, we should be able to walk this through – literally. If not, we’ve not thought this through clearly enough. And, in an increasingly interconnected, autonomous and transparent world, change can grow like a virus. So, the change should be designed to take advantage of the increasingly viral nature of our technological, social, economic and political environment.
3. **Self-direct.** Once our “virus” is released, how will we ensure that it moves in the general direction needed to effect the needed outcome. In an organization, one way to ensure this is through the use of collaboratively developed systemic metrics coupled with increasing transparency about the state of the goal or system we’re collectively concerned about. We need to consider specifically how will our “viral agents” get feedback about the impact of their efforts so that they can adjust and re-align their efforts on behalf of the/their whole.
4. **Self-sustain.** All too often, change efforts – organizational, market and social – launch, gain traction and die<sup>53</sup>. Usually, such efforts don’t survive because they fail to take into account limits to growth inherent in the larger system of which they are a part –

organizational, market, social – even environmental. (See the section below on the Ecosystem for more on this).

We now routinely ask leadership teams this series of questions, insisting that they walk us (and, usually, themselves) step by step through each of these phases. Invariably, they realize the need to deliberately design their change process – organizational, market or social – as a viral strategy – one that they can catalyze. And this is a critical distinction – that leaders need to act as catalysts – and, as with any catalyst, not get consumed in/by the process. They need to stay available to the process to address the inevitable surprises presented by the innate uncertainty of life.

### ***Scalability.***

It is this combination of constituent relationship – emerging from authentic two-way conversations specifically designed to discover constituents' identity and related goals – and constituent and organizational clarity about how this strategy can proceed organically – emerging as a system's leadership thinks through where/how this will start, spread, self-direct and self-sustain – that enables an organization – be it a business, a government or a non-profit – to develop the ability to intervene in a system with scale – and to do so in a way that doesn't exhaust but, rather, enlivens the organization – enlivens us, the people who have committed our time and energies to the work – the purpose – of our organization.

**The Ecosystem.** Once solutions begin to scale – once you're successful in what you thought might be the hardest part of the job – your solution becomes of import to the larger system of which it is a part – it begins to have, as you intended, an impact on its larger host system – usually the society or the environment – that composite of customers/constituents, competitors, distributors, legislators, the press, educators, theologians, politicians, investors/donors, etc. And, your impact may extend to include the regional or even global environment. So, if our solution/strategy is to be sustainable, it must somehow contribute to the net mutual benefit of that larger “ecosystem” of which it is/you are a part – while, at the same time, not so alienating either a dominant stakeholder or a collectively powerful group of smaller stakeholders as to ensure its destruction (or, as in the case of the environment, our self-destruction). Most of these stakeholders have legitimate roles in the society – roles that have now become a part of the infrastructure that sustains our system/ecosystem – and can't simply be ignored or marginalized –not without consequences.

An organization's failure to consider the perspectives of other major stakeholders in the system – be they allies, adversaries or “neutral” parties – often results in a critical miscalculation – miscalculations that, once made, are not easily overcome. So, in order to ensure that our well-developed strategies/solutions won't begin to gain traction and then be thwarted, we need to be able to anticipate their impact on each of the critical stakeholders in the system. So, how do you ensure that you don't inadvertently conflict with the essential interests of a powerful, even necessary, force in the system?

Most leaders think like this instinctively, routinely scanning their environments – often in their “mind's eye” – as they make decisions. In fact, as the scope and scale of a leader's sphere of influence increases, they must increasingly learn to satisfy a broader range of stakeholders if their enterprises and efforts are to meet with success. Startups, in particular, now have to grapple with this consideration – anticipating well before they launch out of stealth mode what barriers in the larger system will they encounter as they scale. But rarely do we do this explicitly, systemically and collectively. Doing so, however, ensures that we come into relationship with and clarity about this next level of our world (and our solution/strategy) that must be addressed if we are to succeed sustainably.

**Ecosystem Relationship.** Engaging at the level of Ecosystem involves *giving stakeholders a voice, demonstrating your understanding and your value add*. You often have to “begin where you are” with what/who you've got, whether or not it's ideal. Many times, you can't even get all of the stakeholders to engage in an effort or event for a variety of reasons – limits of time, money, and access in the best of cases – fear, resentment or animosity in the worst. But, more often than not (and believe it or not) we can anticipate the goals, means and needs of others – if we really make a focused, thoughtful effort to take on their perspective – literally try to stand where they stand and see what they see as if we are looking out through their eyes – seeing, feeling, hearing and experiencing the world as they do<sup>54</sup>. As an integral part of our interrelated system, we are – our

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<sup>54</sup> This is actually a practice that Ghandi employed – taking on the body posture and mannerisms of those he was to negotiate with, doing what it took to access their worldview/perspective. Again, NLP is good place to go to find tools and techniques for literally shifting perspective and experiencing the world from another's point of view (search on “three perceptual positions”).

position and function is – somehow reflective of the whole, enabling us to speculate with a surprising degree of accuracy about other parts/members of the system.<sup>55</sup> And, at this point in our work – our progress with this systemic process – we’ve already experienced some of this – having conversations with different stakeholders, mapping their worlds and reflecting back to them what we see and understand; listening to constituents to understand them well enough to design a scalable solution. And, doing this at the level of the larger system – the society/ecosystem – is neither that different nor that difficult. Again, it requires a shift in our state of being – a shift to literally empathize with them – understanding that, like us, they have purposes, concerns and circumstances that determine much about how they behave in the world. And, if we’ve made a good faith effort at this, they will (when we set out to modify and validate our understandings with them) see, understand and appreciate this, extending some degree of trust in response to our best efforts – that is, if there’s any possibility of cooperation or collaboration at all<sup>56</sup>. This, then, is the beginning of relationship with those larger forces in the society – and, done well, the beginning of a mutually beneficial relationship. And, even if such a relationship doesn’t develop with every part of the system/society, it can begin with a critical mass of the society. And, it may take time – but, then, that’s implicit to sustainability.

**Societal Clarity.** So, how does one ensure that this is done explicitly, systemically and collectively in a way that evidences our good faith and best efforts? How does one rigorously and reliably enter into the state of being that will ensure that, even if we don’t reflect the goals, means and needs of the larger forces in society with precision, we at least move most of the way there? By *integrating stakeholder goals, needs and their value exchange via a thoughtful, balanced stakeholder assessment* like the one done for a clean energy collaboration between 24 utilities, regulators, foundations and NGO’s (please refer to the key immediately below the table):

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<sup>55</sup> All subsystems are reflective of the larger system of which they are a part.

<sup>56</sup> And, according to James Surowiecki (*The Wisdom of Crowds*, Random House, 2004), there’s ample evidence that humans naturally seek to coordinate and cooperate.

## Stakeholder Assessment Worksheet

Perception of Stakeholder Deliverables and Expectations with These Groups					
	Utilities	Energy Policy	Environmental Advocates	Economic Advocates	Industrial Consumers
<b>Utilities</b>	O: Safe, reliable, profitable power P: Increasing competition, costs, complexity; aging, inflexible, underinvested infrastructure; environmental uncertainty	D: Concessions E: Give & Take on issues critical to my success SR: Regulators, politicians, media	D: Compliance with the law E: Work within the legislative process SR: Regulators, politicians, media	D: Jobs; taxes; reliable, economic energy E: Political support SR: economy, workforce	D: Reliable, economic energy E: Predictable demand, loyalty, revenues SR: The generation system; politicians
<b>Energy Policy</b>	D: Good research and alternatives E: Serious consideration and adoption SR: Politicians, regulators, rate-payer funds, media	O: Clean energy development P: Established dirty energy system – both physical and political	D: Environmental Improvements E: Political Support SR: Funders, politicians, regulators, utilities, media	D: Jobs, taxes, clean environment E: Political support SR: Energy system; politicians, media,	D: Energy savings E: Adoption SR: Energy system
<b>Environmental Advocates</b>	D: Sound research on the impact of dirty energy on life on the planet E: Responsible actions to curtail impacts SR: Politicians, regulators, media, the environment	D: Sound research on the impact of dirty energy on life on the planet; political support for change E: Sufficient levels of change SR: Utilities, politicians, media, funders	O: Save life on the planet P: A culture addicted to consumption	D: None E: None SR: Environment	D: Sound research on the impact of their activity on life on the planet E: Responsible actions to curtail impacts SR: Politicians, regulators, media, consumers
<b>Economic Advocates</b>	D: New customers E: Reliable, economic energy SR: the Economy, workforce, community	D: None E: None SR: Energy system	D: Taxes for environmental compliance E: Reasonable demands SR: environment	O: Jobs, taxes, economic growth P: Increased competition, globalization, economic stagnation	D: Community resources for growth and prosperity E: Loyalty, jobs, taxes SR: the community, the economy
<b>Industrial Consumers</b>	D: predictable demand; revenues E: reliable, economic energy SR: the energy system	D: None E: None SR: energy system	D: None E: None SR: environment	D: Jobs, taxes E: Political support SR: workforce, economy	O: contribute to society; make a profit P: increasing costs, competition and complexity;

Key: O = Objective, P = Problem, D = Deliverable, E = Expect in return, SR = Shared Resource

So, before you try to construct one of these, how would you even read it? Let's take an example focusing on the Utilities. If you are the Utility company, your world could well look like this...

“As CEO, my goal is to ensure the sustainable production of safe (first and foremost – for my employees, my customers and my community), reliable (I need the hospitals, the high tech manufacturers and biotech companies, the elderly in their homes and the children in their schools – especially in winter – to have an energy source they can rely on), profitable (I have employees to support, vendors to pay, investors to whom I owe a return) power (be it gas or electricity – coal, nuclear, natural gas or wind based). In my good faith relationships with other stakeholders in a value creating, value exchanging system (in our economy), I deliver value and expect something of value in return – and, you and I likely each impact resources that are critical to both of us. For example, I experience the following with Industrial consumers:

I deliver reliable, economical energy (a significant commodity for industrial consumers in a energy dependent economy); I expect, in return, predictable demand (I can’t afford to build capacity and then have it sit idle), loyalty (don’t leave me holding the bag on my investments on your behalf), revenues (I need to be paid for what I deliver, just like everyone else in the economy); and, our shared resources (resources we both impact) are 1) the generation system (every time I shut down a generator for maintenance or you turn on a major plant, we each put the system under stress and the energy supply at risk and 2) politicians (we’re both trying to ensure that current and future policies don’t unfairly disadvantage us relative to other parts of the system and, where possible, even provide us with advantages – and, sometimes, our demands on them conflict).”

What’s fascinating about this is that, even in good faith relationships, we can be structurally in conflict. For example, with energy policy advocates, utilities – in good faith – offer concessions to the energy policy world and expect, in return, that the energy policy advocates will engage in give and take (some form of compromise) on issues critical to the utility companies success (i.e., as they try to optimize other stakeholder demands in their systems – from employees, investors, customers, etc.). Energy policy advocates, on the other hand, offer (from their perspective) really well thought out, well researched alternatives to the current and future energy needs and expect that, because they are so well thought out, that the energy companies should at least give them serious consideration and, ultimately, adopt them. Both expectations are “reasonable” and, all too often, in conflict.

But, when we know such structural conflict exists, do we have a better or worse opportunity for entering into conversation and relationship with our “partner” in the system? Are they more or less likely to listen to us and to consider what we are concerned about? Do we have a better or a worse chance of coming up with a mutually beneficial solution with this knowledge and relationship than without it? All (forgive me) rhetorical questions – but to make an important point. All too often, we hold – literally, in our minds and even in our nervous systems – other legitimate stakeholders as somehow thoughtless, ill-willed, even malicious participants in the system. More often than not, they are either uninformed<sup>57</sup> or conflicted – trying to solve a really difficult problem affecting multiple stakeholders – and they simply don’t know how.

Returning to our example in Guatemala, it was CARE’s good faith (not flawless) effort to understand their key stakeholders in the system – even one’s with whom they may have felt at odds – that opened a conversation both within CARE, itself, and with their society at large about the individual and collective purpose of their work and its impact on society – on Guatemala’s key stakeholders. As a result of their good faith – and their skill in acting on that in a way that added value to the social conversation – CARE is now both 1) actively invited to participate in an increasing number of significant conversations, relationships and projects and 2) responded to as a leader in Guatemalan society in domains previously unavailable to them. And, they themselves have caused this level of engagement by willingly and skillfully taking on, simultaneously, both another’s perspective and the perspective of the system as a whole – then, actively reflecting that understanding in their thinking, their speaking and their behavior. As a result, they have increased the likelihood that the solutions they develop will be more easily integrated into the existing system and more useful to a broader range of stakeholders.

### ***Sustainability***

This perspective – simultaneously holding one’s own worldview, the worldviews of other key stakeholders, and that of the system as a whole – affords you/us with a unique opportunity to see and understand the system(s) within which we all live, work, love and create. The degree to which

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<sup>57</sup> For example, business and government leaders in Guatemala were completely unaware that malnutrition among indigenous children is as high as 70%, a devastating situation for each child and the nation. When Andres Botran, a wealthy businessman, did discover it, he immediately went to work increasing national awareness and working to solve the problem.

we can internalize this holistic perspective – thinking, acting, communicating, relating and performing from here – and develop strategies and solutions that optimize for that (rather than maximizing the perspective of a limited set of stakeholders) – the greater the likelihood that the system itself (the broad majority of stakeholders as a whole) will want these strategies and solutions to succeed. Such holistic solutions tend to be sustainable.

### **Backtracking and future pacing**

So, we've/you've covered a lot of ground. We've gone from assuming that resolving complex, multi-stakeholder issues was impossible to creating relationship and clarity both individually and collectively through a nested set of relationships – with ourselves, our partners, our team, our organization, our constituents/markets, and our society/ecosystem; in order to cause certain abilities – leadership, trust, innovation, execution, scalability and sustainability – essential to causing a positive, collective change in our world; something that, without such a set of principles, perspectives, and processes would seem impossible – but, now, isn't. And these changes are becoming possible – not so much because these practices are the answers (which, by the way, they're not – simply our preferred approach) – but because we, as a species, must create such solutions. The complex, multi-stakeholder issues now emerging must be solvable. Too much is at stake for us – individually and collectively; for this and future generations – our children and grandchildren and beyond; even for our past generations – if we are to authentically respect and build upon their struggles, their solutions, their contributions. And, as we've covered this ground, we've (Jim and I and those who've contributed to these stories) re-experienced what, to us at the time, seemed impossible – but wasn't. And, now, through our stories, you've experienced a bit of it – at least enough of it to decide for yourself whether or not the issues and opportunities presenting themselves to you are impossible to solve – or not!

### **So, now, that question.**

Early in this conversation, we posed the question “now that you know this is possible, what's stopping you?” We know, from experience that it's not the amount of time involved – that's more than made up for in the ease of implementation and relationship development that this process evokes. And it's not the money – even in the short term, the understanding and insights developed recoup the cost of such processes many times over. And, it's not a matter of skill – we'll even teach

you how to do what we do – that’s the only way this will scale. And it has to scale – this work has to scale – all of us who see and work in this way simply have to scale.

Authentically asking such a question requires that we, ourselves, thoughtfully, truthfully answer the question – i.e., what stops us – or, more to the point, what stops me from doing what I know is possible. My answer lives in my forgetting, from time to time, what’s possible – forgetting, even for a moment, that others do, by and large operate with the best of intentions; forgetting that the broad majority of people want to live lives of meaning and belonging, rarely ever setting out to do the wrong thing – almost always seeking to do the right thing. It’s simply that we live in a complex world where making such decisions isn’t as straightforward as we would hope.

Inherent in my answer is the acknowledgement that this has become, not my work, but my practice – a way of thinking, feeling, acting, communicating, relating and performing to ensure that what’s good for each individual and what’s good for the whole are explicitly and simultaneously named, understood and included in whatever solutions we decide upon.

And, for you, now that you really do know what’s possible – even necessary – what could possibly stop you – what could possibly stop us?

Respectfully,

A handwritten signature in black ink, appearing to read 'R. Scott Spann', with a long, sweeping flourish extending to the right.

R. Scott Spann, Founder & Strategist

Innate Strategies ( [www.innatestrategies.com](http://www.innatestrategies.com) )

May 14<sup>th</sup>, 2007

*Aboard Vivant Pleinement*

San Francisco, CA, US