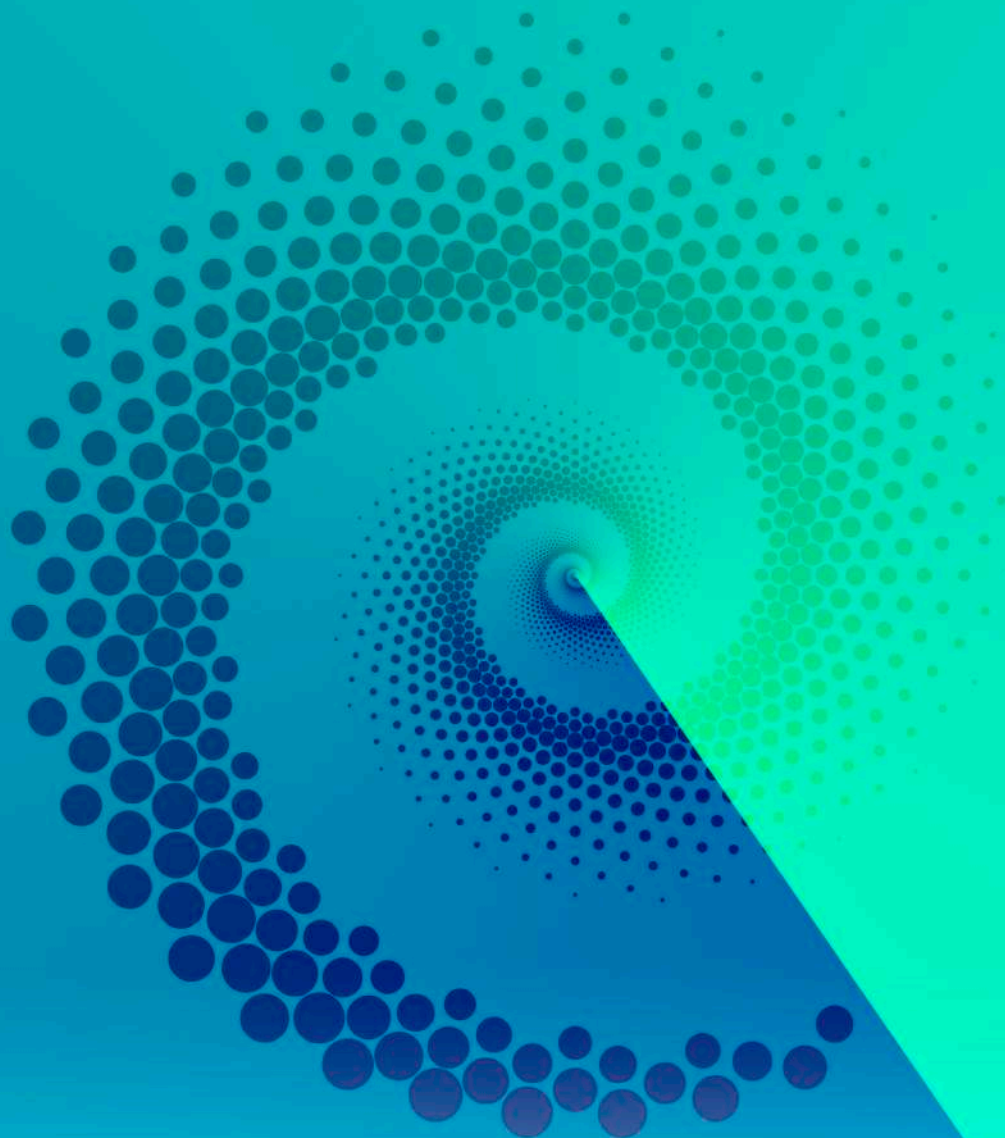


SYSTEMIC INTELLIGENCE IN BUSINESS



Case studies demonstrating how diverse organisations have
benefitted by understanding issues with a systemic lens



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INTRODUCTION TO THE SYSTEMIC APPROACH

Ninety-four percent of companies say 'agility and collaboration' are critical to their organisation's success¹. Yet only 6% of those companies say they are highly agile today. Similarly, 90% of Australian businesses ranked 'a connected workplace' and 'C-suite collaboration' as their joint top priorities². However, only 38% and 43% (respectively) indicated a readiness to tackle these challenges.

We need a new way to address current challenges

These statistics highlight the need for innovative ways to address these gaps. If we continue to use approaches that are dependent upon time and energy we do not have, we will compound our challenges. We need to look beyond our traditional approaches and explore innovative ways that use quantum principles. New ways can provide leaps that accelerate our progress towards agility, connection and collaboration.

Consider how we address the repetitive ten-year cycle in our financial system, where serious breaches are revealed that cause harm in our society and economic system. Recommendations are made and interventions are designed, which only partially address the issues. The issues go underground, only to morph into another version of the same dynamic. Those who are old enough can see the pattern repeat itself. We blame the individuals involved – some responsibility is definitely theirs – but what other systemic forces are at play? If we could discover unseen or hidden forces, we might design a more effective whole system intervention. What if larger numbers of people understood system dynamics and their significance? What would become possible?

Think about searching and finding a substance like Aspartame to replace sugar in drinks and food. The aim was to reduce calories, yet it had significant unintended harmful health consequences, which only came to light decades later. Building dams provides another example. The felling of the trees destroys the microclimate that

1 Deloitte Human Capital Trends Report 2017

2 Deloitte Human Capital Trends Report 2018



then reduces rain in the catchment area, or perhaps limits the river flow. This might cause harmful ecological consequences – drying up the river, or salination effects to the soil downstream. The introduction of cane toads was originally intended to address the problems cane beetles were causing to sugar cane crops. But now the cane toads are destroying our natural fauna and migrating south. All these were apparently good solutions to problems if we look at them from a logical, rational, linear perspective. But they did not hit the mark as systems-oriented solutions. The problems they sought to solve have not been solved – they have ultimately been compounded.

We are facing increasing complexity

We grapple with systemic issues regularly - climate change, energy, food, health, education, housing, economic and financial systems, the environment, diversity, indigenous inclusion and migration. These issues have no quick fixes, no simple solutions. In fact, this level of complexity is increasingly evident in every facet of life. Businesses and organisations are evolving because they must, as the interconnectedness of all things becomes evident and material. If they don't evolve, they won't survive. They will not be relevant.

We can look into almost any area of interest and discover that the lack of a systemic perspective leads to oversimplification. We need to see the complex interdependent network of factors.

This is further compounded if our unconscious biases lead us to make significant errors of judgement. If we have more diverse perspectives that challenge our thinking, our exploration is likely to deliver more informed and more integrated outcomes. However, that requires the mindset, relationships skills and capabilities necessary to engage in purposeful and meaningful co-creation, which is much more easily said than done.

Being able to see the whole system

The notion of mapping systems has been used to great benefit in large-scale system projects. Mapping assists people to understand the whole system better and see systemic effects. It is used widely in a variety of fields such as IT systems, engineering & infrastructure, ecology, biology & environmental science, as well as family system therapy and socio-political contexts. This is a movement towards seeing things as part of a whole system. The system is networked, interdependent and organic; it evolves in an emergent way. It is more consistent with quantum logic.

Developing our capacity to take a systemic perspective is becoming critically important if we wish to address the 'wicked' problems we face; especially those problems that appear intractable and resistant to resolution. In those situations we discover that our strategies of the past are inadequate to deal with our current reality and near future.



What if there was a way to create foresight that, in effect, offered the wonderful benefits of hindsight. Typically, hindsight shows us how our current challenges are consequences of past linear decision-making. This is quite understandable if we realise that the prevailing mindset of the time created the framework that would lead us in that direction.

Working with complexity

Something can be defined as complex if it is comprised of a network of interdependent elements, where the presence of one element has an indirect effect on a number of other elements. An impulse entering the system can have a wave-like impact changing everything (including the whole system itself). Because the relationship is indirect, its effect is unpredictable. It is also possible that some impulses will have very potent effects and others will have very weak effects. To work with such a system, you need to be comfortable with uncertainty and unpredictability. It requires an open mind, curiosity and willingness to experiment, discover and learn. In many ways it defies a rational, logical and linear frame of mind.

The challenge for us is that the rational, logical and linear frame of mind has evidently been proved useful. We have created success in our lives using that frame of mind. It is reassuring and provides us with a feeling of certainty, predictability and validity. This is where our unconscious bias comes in. We have a great capacity to fool ourselves because we can be selective in our attention. We can 'tune out' things we don't want to see for any number of reasons, and this can happen subconsciously. We can use our rational, linear, logic to argue for points of view that, by another person's logic, don't stack up. This leaves two people in heated disagreement, biased and convinced that the other person is being illogical. In fact, they may both be right, depending on which aspect of the whole they are arguing for. Further, if they found a way to respect and include what each other was bringing to the conversation, they may have created an expanded perspective. However, this is not available if they are intent on proving their point of view, so potentially it is a lost opportunity.

We need to be able to use our rational, logical and linear thinking within a bigger frame of mind that includes holistic, emergent, quantum thinking. Then we end up with collaboration between these forms of thinking. The collaboration is known as trans-rational thinking. We need the synthesized assets. We need a more holistic expanded perspective.



Tapping into our inner knowing

So what are these holistic, emergent, quantum ways of knowing? They include various forms of well-researched intuition:

- » non-conscious pattern recognition through implicit knowledge (when an 'aha' occurs and we 'know' we have found what we were looking for),
- » energetic sensitivity (a form of somatic sensing of electromagnetic fields – we can sense something energetically and 'know it', e.g., when we are being observed by someone),
- » non-local intuition (where we can sense, through our physiology, something that has occurred a long distance away, e.g., a parent senses something occurring to their child).

All these ways of knowing require that we develop our ability to listen to our sensory awareness, so we can become attuned to the cues, turning them up and down as needed. Mostly, we are switched off to this sensitivity unless something grabs our attention strongly.

Consciousness is the state or quality of awareness. It is an inner awareness regarding how we think and feel about something. It is also an outer awareness regarding how we perceive things, what we pay attention to or not. This awareness is a rich range of possibilities, requiring development and attunement. Inner awareness is particularly important because, typically, if we have unpleasant feelings we seek to get rid of them. This can happen outside of our awareness, so we possibly deny, distort, or delete information. This influences our perception. In this way, we can create veils of illusions. Our perception and the meaning we make can also activate our unconscious biases, which enhance the illusions. Then we get further away from reality and miss all the subtle valuable cues that are available for us.

When we are working with complexity and uncertainty, these are the skills and abilities we need to be able to work with it effectively. Becoming aware of our inner states and being able to manage them well ensures that we can keep an open mind, become curious and explore possibilities. We can expand our ways of knowing. These are essential pre-requisites for working with complexity.

Having an enhanced perspective

Our frame of reference becomes very important here. Where is our primary point of orientation? It is in ourselves and how we feel? Is it in our sense of what we want to create? Or is it in our exploration of larger possibilities?

To illustrate this, here are three different relationships with ideas:

1. 'I am the idea'
2. 'I have the idea'
3. 'What ideas are there yet to be discovered?'



If I *am* the idea, I have to defend it because it is a reflection of me. If I *have* the idea, I have more flexibility with it – I am considering its usefulness given what I am trying to achieve. If I'm *curious* to find out new ideas, I am deeply interested in others' ideas and how they might generate new ideas.

What we are interested in will determine the scale of our perspective. The scale of our perspective will determine the level of complexity we can work with. It will call on our capacity to sit with creative tension, work with uncertainty and unpredictability and manage and take risks while we work in an interactive way with the system. It will evoke in us a deep interest in new and different ideas. We will loosen our attachment to our particular ideas and ways of knowing, instead becoming explorers, seeking beyond our known experience and inviting other's ideas, knowing full well we can trust our inner compass.

Collaboration requires high levels of engagement and sophisticated relationship skills. It includes well-developed emotional and social intelligence. It is called for when we want to create something where interdependence is essential. Complexity calls for collaboration.

As originally stated, 94% of companies say 'agility and collaboration' are critical to their organisation's success. Yet with only 6% saying they are highly agile today, clearly there is a big gap to be closed.

Systemic Intelligence

- » What difference would it make if we could see the whole system?
- » What if we could map our understanding of the elements of the system, and discover if any aspects were missing from our mental model?
- » What if we could explore the relationship between the elements, and discover what had more potency in the mix?
- » What if we discovered hidden dynamics that were having a material effect but were previously unknown?
- » What if we could discover what was needed for various elements to have a better relationship with each other, so the system could be in flow, doing what it is designed to do?
- » What if we could let the system have a voice, so we could listen to the system itself?
- » What if we had some ideas about what to do and would like to prototype our ideas before real-life implementation, to gain insights and optimise our actions?



Systemic Intelligence is the ability to respect, understand and work with systems and their dynamics. It requires the consciousness to pay attention to and listen for the messages of the system.

Systemic Principles

Systems follow systemic principles of purpose, leading principles, belonging, order and exchange. If these principles are breached, symptoms arise in the system causing disturbance, resistance and opposition.

Purpose

For an organisation to exist, it must have a Purpose that serves society. Without a Purpose an organisation will cease to exist. The Purpose may be clear or unclear. It acts as a key organizing principle. Interestingly, the organisation's existence is not dependent upon people recognising its Purpose. The Purpose may be hidden from view and still operate. When it is clearly articulated and understood by everyone in the organisation, the Purpose can serve as a means to create coherence. This provides great leverage. When the Purpose is clear, the system relaxes: functional units and individual roles are able to more easily slot into their place within the whole.

Leading Principles

Life energy is a movement that wants to accomplish something in the world. If something (a person, a team or an organisation) comes to life, there is something that wants to be accomplished by its existence. The Leading Principles are the effects of this life energy. They connect the organisation to the outside world. They create the place for the organisation in society as part of the greater whole. Similarly, every team has Leading Principles connecting it to the rest of the organisation and the outside world, giving its place in the whole. We also have personal Leading Principles which do the same.

Leading Principles of an organisation answer the following questions: "As an organisation, what are we to the outside world?", and, "What does the outside world want us to be in the future?" For most organisations, teams and individuals there are 2-3 Leading Principles which fit in a specific relationship with each other; a configuration. The same Leading Principles in a different configuration have a vastly different effect. They form an identity. Products and services carry these Leading Principles.

For the life energy to flow and reach its destiny alignment between the Leading Principles of the person, the team and the organisation to generate coherence.



Belonging

The simplest model of Belonging is what we know in family life. We all belong to a family and have biological roots. In organisations, Belonging applies to the value people have to offer in the system at the time. However, once someone has been a member of an organisation, their contribution, be it positive or negative, always belongs; it becomes part of the fabric of the organization. Excluding or diminishing a person's contribution creates disturbance in the system and creates limitations. In Belonging, we also see seasons of mutual exchange come and go. The workplaces where we best belong, according to our respective skills and experiences, change with those seasons.

Therefore, it is essential to practice healthy joining and leaving in organisational life for the system to maintain a healthy level of internal and external connectedness. The same principle applies to products and services as it does to people. All systems want to be complete.

Order

Order speaks to knowing our place in the organisation's system. There can be different hierarchies depending on a person's history with the organisation, the level of responsibility they have for the organisation and the competence they bring to an issue. When individuals or departments step into behaviours that are out of Order there can be many ripples of disharmony that negatively impact on performance. Orders can be quite fluid; if the Orders get confused even people with the best of intentions run into trouble. Becoming more conscious of the systemic importance of Order, and how it is easily disordered, helps create more effective responses. How roles are named, for example, can play a big part in expanding or contracting the smoothness of operations. All systems want every element in the optimum place.

Exchange

Each system is always striving toward a healthy balance between Exchange (also known as give and take). It is expressed in terms of talents, funding, money, power and influence. There are different levels of give and take in different contexts, e.g., being new to something means you take more; being experienced means you give more. If we don't consciously work towards this balance, the system will do it for us. Worker revolts or union strikes are more dramatic examples, but every day we see parts of organisations exercising the energy of re-balance: shareholders demanding higher dividends, management demanding higher productivity, workers demanding improved conditions or higher wages, and the many reciprocal pressures they each meet. This applies to products and services as well. Some products or services provide the funding for other products or services to be developed. All of these are expressions of Exchange at work. All systems thrive on the Exchange that is generative, in the right measure and which creates flow.



Acknowledge What Is

As we examine these principles in action in any organisational situation, system dynamics often present data that simply seeks to be acknowledged as What Is. Without forming any judgment, the simple acknowledgement of truths, realities, or situations can resolve disturbing dynamics. For example, acknowledging the significance of a founder, acknowledging someone's contribution that has been overlooked, or acknowledging a difficult decision and its previously unspoken impacts. During a major change program, such acknowledgement can help individuals or teams calibrate their contributions to ensure more successful outcomes. If important elements are ignored, the system will find a way of remembering them, often in significantly disruptive ways. It is often a powerful key for unlocking the energy needed to bring an organisation back to good health. You can see what a surprising calming influence it has. The system is often trying to bring things out into the open that we are not seeing or have denied.

By developing a systemic lens, we can fully leverage the systemic intelligence that is available. With awareness comes new perspectives and increased choices which enable us to release the flow in the system to achieve its purpose and potential.

This work is best understood by case studies.

Systemic Intelligence case studies

This book is a collection of case studies provided by Organisational System Dynamics Practitioners in Australia.

When we do this work, we work in co-creation with our clients. We are seeking to understand what aspect of the system needs to be examined and then we examine that system. We come with no preconceived notions. We are seeking to listen to the system. We have no prior ideas of what a good solution would be. We will ask you what a good outcome of the work would be; we do it together. Some clients come with a healthy degree of scepticism – this is welcome, as are all perspectives. Our focus is to include everything that belongs as a source of contribution to the system.

These case studies here are drawn from the people who have trained in System Dynamics and Organisational Constellations. They are examples of where complex deep issues have been addressed in a relatively short period of time with substantial material benefits. You could say they achieved a quantum leap for the people, business and organisations.

Sarah Cornally





UNDERSTANDING ROADBLOCKS TO INNOVATION

Grace, a partner of a professional services firm, had a long successful track record of bringing innovation to her practice. She was in demand in her field for the value she brought to her work, and was an advocate of innovation within her firm. Grace had identified threats from traditional ways of operating, and could see lots of opportunities for innovation to provide a good future for the firm. In recognition of her strong expertise and in line with the firm identifying innovation as important for its future, Grace was formally appointed to the firm's Innovation Leadership role.

Despite her position, and the firm's commitment to innovation, she experienced resistance and a lack of engagement from the system overall. There was a mismatch between what was said and what was experienced. Grace was interested to see what system dynamics were working against her influence, and what could enable her to mobilise more movement towards innovation. Grace engaged a systemic facilitator to assist.



Insights revealed through systemic intervention

The facilitator set up a structural constellation with Grace. Grace had an internal image of how the elements of her role worked together. She set up a space that included representatives for these elements, which included the lawyers, the leadership team, her budget, the business model, the client, her own focus and her objective (to mobilise innovation).

Initially, there was a very poor relationship between all the elements. It was clear that there was a lack of alignment between some of the elements. The business model was not robust, yet this was not recognised by the lawyers. The very thing that Grace was concerned about was under threat, and yet the lawyers were not engaged with the idea of mobilising innovation to address the threat.

As the facilitator explored the system further with Grace, it became clear that the lawyers were effectively captured by the demands upon them (to meet clients' needs). Initially, this was their focus, and they were uninterested in anything else. They found anything else annoying and resented it.

As the work unfolded, relationships were explored and positions changed. New possibilities and insight emerged. The clients were interested in the innovations,



and the lawyers realised their importance for the future. The lawyers wanted a way for the innovation to be developed by the relevant people. They wanted to have a voice in the developments, without burdening or distracting those involved, and they wanted to be informed when it was time to implement changes. They wanted to be consulted, but in a way that was accessible and cognizant of the demands of their current ways of operating.

Grace now had a much more nuanced understanding of what was going on in the system. She knew now how to connect with and influence the various elements. She could reconcile what she was hearing and experiencing from others, and she had a pathway forward.

Her key takeaway point from the session was how to involve the lawyers, without burdening them, by engaging only those who were interested. She did not need to convince those of them that were not interested in innovation. She understood what others in the situations did not currently understand, which made her work clear going forward. She realised it would be wise to calibrate her expectations of speed.

The systemic work was a great help, as she now had a clear image of how to work through the issues she was facing. It was as if she had a blueprint; a path that was flowing.

Outcome

When the facilitator checked in with Grace, several weeks later, she shared that things were progressing slowly. She had initiatives that were progressing well with people who self-selected involvement on the basis of their passion for the projects. She found the systemic work a great help, as she now had a clear image of how to work through the issues she was facing. It was as if she had a blueprint; a path that was flowing. The degree of resistance and opposition was significantly diminished.



CASE STUDY FACILITATOR: Sarah Cornally

With over 30 years consulting experience at executive and board levels, Sarah has invested the last 10 years developing expertise in the multidimensional language of systems. Sarah is committed to enabling the potency of systemic intelligence to create greater capacity in today's leaders, in order to respond insightfully and effectively to uncertainty and complexity for healthy thriving systems.

Find out more: www.sarahcornally.com.





SUCCESSION PLANNING FOR A FAMILY BUSINESS

Eve was the founder of a successful retail business, with multiple stores and significant online sales, that had grown significantly over twenty years. Eve wanted to step back from the day-to-day running of the family business, and from having personal assets tied to the business. Her partner, Mike, had also worked in the business at length, and wished to retire. They had three adult children who had all worked in varying capacities in the business. Despite many attempts over three years to work through a family succession process, the family had been unable to find a satisfactory path forward. After discussions with Fiona, a systemic facilitator, Eve decided to engage with a systematic succession facilitation process to gain clarity about her next steps.

The challenge was the entanglement of the family system with the business system. The family was very close, cared deeply for each other, and sometimes felt unable to say what was necessary for the future health of the business, particularly if it might negatively impact their personal relationships. Several family members mentioned that the business felt like 'the fourth child' in the family, with all members having a role and a sense of ownership in supporting it to thrive.



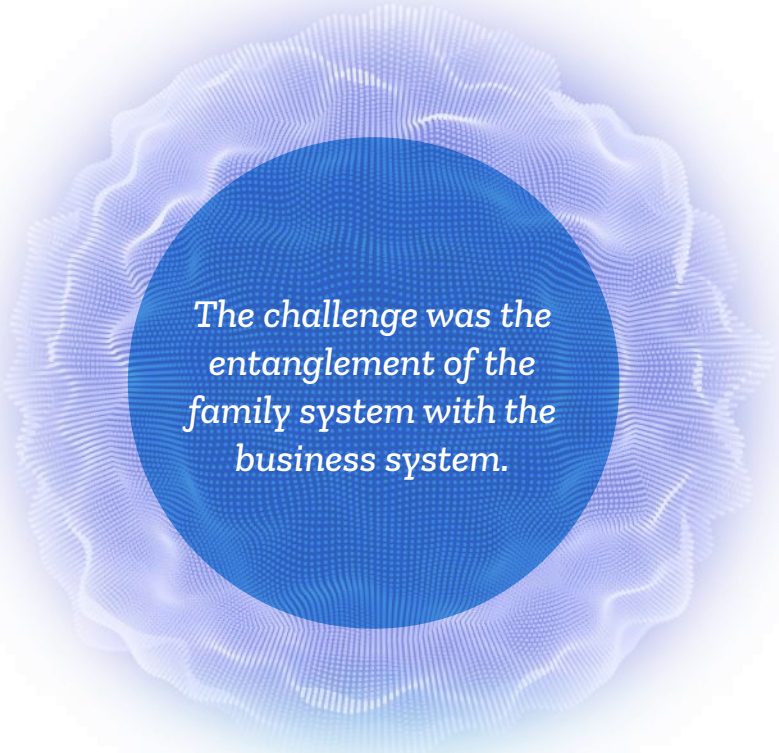
Insights revealed through systemic intervention

Systemic exercises were done over four separate sessions, revealing some interesting dynamics. The children expressed some concern at what their mother would do without having the business to run – would she be able to step back and let others take charge? This was tested through a process of setting up the current hierarchy in the business and experimenting by physically moving and reporting the results. The parents physically stepped out of a space representing the business system, and were pleased to notice that they felt good and were proud of what the family had built together.

It was clear that Darren, the youngest child, wanted to take on the role of leading the business as General Manager. The two daughters also showed a strong desire to stay involved. Everyone wanted to keep the business in the family.



The future shareholding of the business required resolving. This was explored by using a systemic exercise in which separately every family member was given ten pieces of paper to represent shares in the business. The facilitator asked, 'With what you understand today, and considering what each has contributed, how would you allocate these ten shares to each of the three children?' Interestingly, both the daughters allocated the son a higher percentage of shares than for themselves (but the mother, father and son did not).



The challenge was the entanglement of the family system with the business system.

The parents divulged in a separate conversation to the facilitator that Darren had already received a substantial amount of money, intended as compensation for the extra contributions he had made. However, this had been kept secret from the two daughters, which explained why their allocation of shares in the exercise was skewed towards feeling their brother deserved more compensation for his contribution.

The facilitator advised that, in order for the system to have a healthy flow, it was necessary for everyone to be informed about this payment. After careful consideration, Eve decided to tell each of her daughters separately, and was surprised that they understood the fair exchange this payment represented. Now Darren's compensation had come to light, it was agreed that the remaining exchange (the split of the shares in the business) would be equal between the three children.

After four sessions and much discussion, the new roles and compensation had been planned out to everyone's satisfaction; the result felt fair and equitable to all concerned. By setting up a board and management structure, Eve retained input as Chair of the Board, and Darren would report as GM, to the board.

A final systemic exercise was set up to encourage a good transition. Darren expressed his gratitude and appreciation for all his parents had done to build the business and train him in his role. The daughters expressed their thanks and desire to take good care of the business on behalf of their parents. Everyone respected and valued what had gone before and the opportunity that was available to them all going forward.





Outcome

A few weeks later, Eve explained that some days she felt excited about her approaching freedom, and other days she felt sad about no longer being involved. This was acknowledged as a natural part in the process of transition.

Each family member expressed sincere and deep gratitude to the facilitator for the support and involvement as they worked through a difficult and personal process.

A year on, the family had made strong progress with the transition including with their operating board and management system. They had far greater clarity and respect for their roles both as family members and as part of the business.



CASE STUDY FACILITATOR: Fiona Pearman

Fiona is a systemic practitioner working with organisations to facilitate alignment of the culture and leadership of an organisation with its brand purpose to achieve powerful commercial outcomes. Fiona is particularly interested in organisations fully accessing the potential of all their people through embracing practices that support greater gender inclusiveness, which is how she came to co-author Core Confidence. coreconfidence.com.au/

As a facilitator, strategist and coach, Fiona has worked with a broad range of organisations, including Zurich Insurance, Coles, Toyota Australia, AIA Insurance, Commonwealth Bank, CoreLogic, RSPCA, Krispy Kreme, Woods Bagot, Volvo Car Australia, several NSW Government Agencies, APP (subsidiary of Transfield) and UnitingCare. Find out more: pearmanandpartners.com.au/





OVERCOMING DECISION PARALYSIS

Susan had been working in professional services for eight years, and was ambitious to accelerate her career progression. She had developed a strong reputation for high performance and was looked up to as a role model within her organisation. Although she was identified as having high potential for future partnership, her remuneration remained unsatisfactory, despite Susan having made a strong business justification for requesting a significant increase.

Another firm had approached Susan with a formal job offer. Despite numerous conversations and meetings about the new role, she did not know whether to accept it or not; she felt almost 'paralysed' by the choice. A feeling of strong attachment to her current organisation contributed to her difficulty making a decision. She agreed to participate in a systemic constellation session for insight into her own decision-making process.

Insights revealed through systemic intervention

To begin the constellation, Susan entered a physical space along with two other people acting as representatives for her two choices. Some unusual feelings arose: Susan felt distracted by possibilities and did not want to be seen; and the person representing the current role felt cornered and ashamed. The facilitator understood this to indicate a potential context overlap – some part of the current situation was being confused with another unknown element in Susan's mind.

Once the presence of this unknown element had been noticed, the facilitator was able to give it its own representation in the space. This allowed its emotional influence to be separated from Susan's decision. The participants no longer felt any pressure or shame.

Susan now felt she could see her current role clearly. She was able to thank her current role for all that it had given her. The person representing the current role thanked Susan in turn, and told her that she was free to go.



Outcome

Susan was physically released from the intensity of the emotion regarding her decision. She immediately said that she felt lighter. It gave her a new perspective; that this was just a decision to make, not the end of the world. After waiting one week, she still felt the same, so she made her decision and handed in her resignation. After the first week in her new role, she reported feeling more like herself: 'so much happier, cheerful, engaged with people'. The constellation had helped her feel confident and comfortable in making her choice.

Susan was physically released from the intensity of the emotion regarding her decision. She immediately said that she felt lighter now.



CASE STUDY FACILITATOR: **Kate Boorer**

Kate Boorer is one of Australia's leading experts on career, confidence and personal brand. She is a sought-after speaker mentor and facilitator who helps CEOs, leaders and professional women achieve commercial, professional and personal success.

Find out more: www.yppwa.com.au





OPENNESS TO CULTURE CHANGE

A utility company in a developing country wanted to bring about a culture change. The General Manager was new, the predecessor having left at short notice. There were concerns about inefficient work practices and the lack of commitment of certain longer serving team members.

A cultural change program was designed for this client, aiming to align the senior leadership team, give them shared clarity about the organisation's vision, and provide them with tools to manage change. The final step was to present the vision to all employees in a town hall meeting. The work was conducted over a period of four months, including group sessions and one-on-one coaching.



Insights revealed through systemic intervention

A facilitator worked with the leadership team and employees with a systemic approach. The facilitator sensed that the company's history was important and had to be recognised. The first session, then, was begun in the group's traditional way, involving a prayer from a senior member that settled the energy in the room. There were introductions, then an exercise that acknowledged every member's length of service. Starting with the longest serving member, each person spoke about why they joined, what their role was, the challenges the company had overcome and their greatest success.

Honouring the past

As each person told their story, it became clear that as individuals they were personally very committed, although the organisation had always struggled financially, and resources were scarce. People were proud of how they had continued to operate; despite the lack of resources and various financial challenges they faced, they had got things done and kept going. The most powerful moment was when Sam (one of the members whose commitment the General Manager was concerned about) spoke of his biggest challenge and proudest moment. He talked about when a major plant station had been vandalized by rioters. He went with his team, physically fought the rioters off and restored the system in two days.



This gave fresh perspective to the members listening. It was particularly helpful to the newest recruits from the private sector, who had viewed the organisation as very inefficient. The change in their demeanour was visible.

As more team members spoke, the circumstances around the previous General Manager's departure came out. Relevant leaders spoke honestly about how hard it was to manage the situation, and of their commitment to making things better. The newer team members started to acknowledge their colleagues and what they had done. Specific statements were used to verbally acknowledge everybody's contribution and express good will. People readily spoke these words with great meaning. These discussions brought a lightness to the group.



This gave fresh perspective to the members listening. It was particularly helpful to the newest recruits from the private sector, who had viewed the organisation as very inefficient. The change in their demeanour was visible.

Physically moving into the future

The members were asked to move physically in the space to represent a journey from the past to the present. This movement was done in silence. The people used gestures to portray leaving in the past the emotions, thoughts and events that belonged there. They also used gestures to indicate gathering up what they had learned from the past that they wanted to take into the present. Sam showed in his body language that he was struggling to move forward, but in his own time made the effort and moved forward with complete commitment.

Again, the members were asked to make a deliberate movement, indicating that they were leaving certain things in the present that needed to stay there, and gathering resources to take into the future. As they stood in the future, they looked behind to acknowledge the support of the past. They settled with the possibility of bringing a new culture into the organisation. They were ready to engage in change.

Through the following sessions over the next few days, there were still difficult moments and discussions to be had, but the groundwork had been done. They had confirmed and committed to the vision, mission and values of the company, and agreed on the team behaviours that would allow them to create the change. Further sessions and coaching continued over the next four months.





Outcome

The final phase of this program was to assist the team to prepare and present at a town hall meeting of all 120 employees. The managers used the framework from the initial session to structure their speeches.

Presenting change, in context

First the past was addressed, as managers presented the history of the organisation and acknowledged people's contributions. They spoke about which behaviours would stay in the past, and which behaviours from the past worked well and would continue. Another manager spoke about the successes the organisation was experiencing in the present. Then the General Manager spoke about the vision, mission and values for the future, outlining the strategic plan.

A new set of expected behaviours was presented to the employees, clearly related to the behaviours everyone desired to see continued from the past, and also to the values set out for the future of the organisation.

Employees broke off into pairs to discuss their thoughts and consider how their behaviours could support the values. Everyone identified their own individual commitments to specific actions, which they would share with their managers over the following week.

In review, the leadership team had been able to embrace change, and present it in a way that fully engaged the employees. Collaboration and accountability had improved across the organisation. Leadership development continued and now has been extended to the next level of managers down.



CASE STUDY FACILITATOR: **Murray Wright**

Murray is an executive coach and facilitator based in Sydney. He supports individuals and teams to become better leaders, make a positive impact and live a better life. His work is dynamic and underpinned by contemporary approaches including systems work, narrative coaching and mindfulness.

Find out more: www.murraywright.com





AUTHENTIC WISDOM FOR BUSINESS DEVELOPMENT

Michelle is a highly educated executive coach and small business owner.

She set up her consultancy and coaching business five years ago, however, had never fully focused on developing it. Despite using various business coaching programs and hiring consultants, she said that she had not committed to her business. She was curious about what she was avoiding and wanted clarity about what was getting in the way.



Insights revealed through systemic intervention

Michelle worked with a facilitator to explore these issues systemically. The facilitator started the process by placing sticky notes on the floor in a triangle shape to represent three belief polarities – Knowledge, Love and Structure/Order. Michelle was to step into the space represented by each belief to see what insights came to her.

In the space of Knowledge, her clear sense was that she had a vast body of knowledge, but was unsure about articulating it for self-promotion.

The space of Love was familiar to her – Michelle recognised that she often used love and authenticity in service of her clients.

She was most challenged by the space of Structure/Order. The idea of Order brought thoughts of a metaphorical cage and an uncomfortable link to 'rules'. Michelle had unconsciously been avoiding order and resisting rules. She realised now that this also led to an inability to access the benefits of Structure, as she had closed herself off to both. Structure, to her, meant paying attention to the scaffolding and support that a business requires (such as creating a website, setting up administrative systems).

While still standing in this space Michelle had a strong yearning to make a gesture of holding a crucible in front of her abdomen. She made the connection from that to her business and called it 'an alchemical crucible', representing a 'flame in the belly' – creativity arising out of the love in her heart.

Michelle took from this process that she has the know-how in her energy. She realized that she was caught in either/or thinking and that there is untapped richness available to her. In her words: 'I have the Knowledge, Love and Order in me.'





Outcome

In the debrief immediately after the constellation work, Michelle interpreted the crucible to represent wisdom. Her sense was that she was taking something away from the session to develop, to let grow and to nurture. Michelle also became clear that she wanted to 'outsource the cage'. For her, this meant engaging someone to do her scheduling and bookkeeping, so that she can 'slip along from appointment to appointment' without get weighed down by administrative tasks.

Over the next few months Michelle made a lot of changes to free herself up to allow wisdom and creativity to arise naturally to progress her business. Additionally, she started the process of developing a new logo and website, which required her to consider her unique business offering. She realised that she was the only one who could discover this; that she 'cannot outsource authenticity'.

A new opportunity came up to join a small core team of associates in a new venture. She accepted, and enjoyed the renewed focus on creativity that it brought. This smaller team had less Order (rules) than the previous big businesses she had been working with. She said, 'I am totally authentic. Working with this new team, there is structure and there are frameworks, but within those it is very fluid. My whole reality has changed.'

She was challenged to focus on Structure/Order when writing a proposal for a significant project – she could still feel her past feeling of wanting to resist engagement with the rules, but her predominant experience was her new feeling of being able to flow. She was no longer stressed or anxious about Structure/Order, and she spoke about having more space for authenticity and creativity overall, including in relationships.

As Michelle stood in the polarity of 'Structure/Order', a significant internal shift occurred. Michelle had a strong yearning to hold a crucible, mirrored by her left hand in front of her abdomen, palm upwards.



CASE STUDY FACILITATOR: **Dominique Beck**

Dominique Beck is an executive coach who utilises neuroscience-based coaching and training to help her clients achieve individual and team objectives in a structured, systematic way.

Find out more: www.dominiquebeck.com.au





REFRAMING FEAR

A company director, Keith wanted to explore a private problem through a systemic approach known as a 'blind' constellation. This meant that without articulating the details of the issue, he said only that he had a situation he was struggling with. He wanted to explore certain dynamics that were stopping him from achieving his goal at work.

Insights revealed through systemic intervention

Keith worked with a facilitator in a group setting, who asked for volunteers to represent various concepts. One person stood in as a physical representation of Keith's focus – in other words, himself; another person represented Keith's secret obstacle; a third person represented Keith's goal. The facilitator positioned the three representatives around the space.

The initial feelings of the representatives were clear – they were all uncomfortable with their positioning. There was an unhealthy fixation on the obstacle (instead of a healthy focus on the goal). The person representing the obstacle was standing hunched in a way that reduced his size, so that he appeared like a small, timid child. This seemed to represent the fear or anxiety Keith was feeling.

Keith noted the accuracy of the representative's experiences and sensations. This compelled him to offer all the information that was previously hidden. He outlined the specific problem, explaining that he had been recently diagnosed with an enlarged prostate and was due to undergo a surgical procedure. The anxiety he felt about the surgery was affecting his ability to perform the duties of his job. He was hoping to feel confident about the surgery so that he could be fully present in his role.

The facilitator encouraged the representatives to speak deliberate healing sentences to each other. After they had acknowledged each other and spoken words of reassurance, they felt calmer, more settled and better connected. The representative for the obstacle was able to take up a new position indicating support (portraying that the client's anxiety could now be a source of strength). There was a new clear path between the client and the goal.



Outcome

Keith reported that the constellation 'was good for me because it put the fear in its proper place.' He realised he had previously put too much emphasis on his fear, and that it was blocking him from thinking clearly about his day to day responsibilities. After the constellation, he felt much more confident about the upcoming surgery. His anxiety was at a normal level and he felt he had the resources to handle it. He used the image of the constellation to comfort himself and reconnect with his goal, so that the anxiety did not overtake him. Later, he described the constellation as 'a true turning point in reframing fear'.

Keith used the image of the constellation to comfort himself and reconnect with his goal, so that the anxiety did not overtake him.



CASE STUDY FACILITATOR: **Richard Cornally**

Richard specialises in storytelling, presentation and communications, with a focus on developing Authentic Presence. As a Systems Dynamics Coach & Consultant, he has helped dozens of clients achieve their creative and career goals.



CONFIDENCE IN A NEW SENIOR ROLE

Emily was new to her role as **Head of Risk Management** for an international finance firm. She found herself struggling to get support, clear guidance and recognition from the other directors. Some directors were still calling her predecessor for advice, rather than asking Emily directly. Other directors seemed dismissive or ignored her.

Emily wanted to gain insight into being more influential in her new role, and she wanted to feel confident in gaining ongoing support.

Insights revealed through systemic intervention

Emily worked with a facilitator to explore this issue with a systemic approach, in a small group setting. The facilitator asked Emily to lead one person into the space to represent herself, referred to her as her 'focus', and another to represent her objective. She also chose people to represent relevant directors.

The person representing Emily's focus felt uneasy in the space. She sensed that Emily's predecessor, the previous risk management leader, was still intertwined in a complex unknown relationship with the division head, and that they were focused elsewhere. The representative for Emily's predecessor confirmed that he had worked out his own way to deal with the other directors over time, and that he did not expect Emily to use the same method. He wished Emily would make her new role work in her own way. The division head confirmed that he also wanted forward motion, and was not concerned with what happened in the past.

The participants used healing sentences to resolve this entanglement. The representative for Emily's predecessor was asked to speak to the representative for Emily's focus, saying: 'You have all you need. You will do it differently. I have another focus.' The representative for Emily's focus agreed. All participants felt less stuck, and were able to shift to more comfortable positions in the space.

They finished with the representative for Emily's focus facing the future. She was aligned with the representative for the division head. All participants took a step forward together.





Outcome

By the end of the constellation, Emily had gained confidence that the issue with the previous leader was really a non-issue. She saw that he just had another agenda with other directors that was separate from her. She also saw that the division head was busy with focused plans for the future and that she needed to follow – clarity would come in its own good time.

She left the session feeling that a good outcome was achieved. She felt more confident and relaxed in her role. The representative for Emily's predecessor felt relieved that Emily was making her own forward movements and disentangling herself from the relationship issues between others.

One week later, Emily reported being focused on her own role in the business, having already achieved two specific good outcomes for other directors. She was able to be more grounded at her next meeting with the division head. At the end of the meeting, he took her aside to give her clear encouragement. She no longer felt the need to address her predecessor's relationships with other directors. She focused instead on being more proactive with delivering strategic advice and becoming their trusted advisor.

Six weeks later, she felt more relaxed and more strategic overall.

By the end of the constellation, Emily had gained confidence that the issue with the previous leader was really a non-issue.



CASE STUDY FACILITATOR: **Tim Rossi**

Tim Rossi facilitates team coaching sessions and offsites for corporations and their boards across Australia. His early career included roles as an executive director at Macquarie Bank and CEO of Australia's first listed Futures Broker.

Since 2000, his company, Symphony Leadership has been supporting executive leaders and their teams as well as boards, government entities and Not for Profits, to meet their leadership systemic and personality based challenges and grow.

Find out more: www.symphonyleadership.com.au



ALIGNING PURPOSE AND INCREASING SUPPORT BETWEEN EXECUTIVES


Aimee was recently appointed as the Strategic Marketing Executive in a prominent educational organisation, at a time when marketing is more critical than ever to the organisation's future success, due to critical government perceptions, more demanding customer expectations, and a highly-competitive global environment.

Despite this, the Marketing Function did not have a "seat at the executive table", and operated largely in competing silos across the organisation's semi-autonomous divisions, resulting in suboptimal ROI on marketing investment.

The work in this case study was the third in a series of systemic sessions with Aimee, Eric (a key Marketing Executive from a different division) and three of their direct reports.

The first two sessions focused on establishing a positive collaborative relationship between Aimee, Eric and their divisional teams — an important first step towards improved effectiveness of marketing as a whole.

This third session focused squarely on exploring 'a seat at the Executive Leadership table' for the Marketing Function. A systemic process, known as organisational constellations, was used to unearth the hidden dynamics affecting the Executive Leadership Team's relationship with the marketing function, as well as to explore potential solutions.



The intention of the systemic process was to help the Marketing function get 'a seat at the Executive Leadership table'.





Insights revealed through systemic intervention

The participants in the process represented various roles in the business. To start, one person was asked to represent the entire Executive Leadership Team. Another person represented Aimee's role in the business. They faced each other as if they were on opposite sides of a glass door. The representative for Aimee seemed eager and wanting to rush into the relationship, and the representative for the leadership team appeared to project superiority and dismissiveness. The ELT did not want to allow Aimee into their space.

Soon it became clear that underneath the superiority were feelings of vulnerability and weakness. The representative said 'We were hurt by Marketing in the past... (pause)... We do not know if we can trust you yet... (pause)... It may take us time to trust again.' Aimee's representative replied: 'Yes, I see you were hurt. My intent is positive and to contribute. I am here to serve you.' After some time in silence, the representative for the leadership team added: 'We have not respected you and what you have to offer,' which had a noticeable impact on Aimee, who became more enlivened and agreed, 'I have not felt valued.'

The representative for the leadership team felt lighter and more welcoming after this exchange, and followed their impulse to invite Aimee's representative into their space. Both felt it was good, and expressed optimism about their future together.

Next, a representative for Eric was chosen and stood at the (virtual) open glass door, facing the Executive team. Again, there were uncomfortable feelings on both sides. Eric's representative appeared rigid, resistant, and weak, without gravitas, and the leadership team still appeared resistant, so an experiment was offered. The leadership team was invited to acknowledge what seemed to be going on: "We have been focused on ourselves and our own hurt." The leadership team representative acknowledged that this felt true, which had an immediate effect, with the representative appearing more at ease.

With the relationships now in a positive state, it was time to bring a more expansive common focus. The facilitator asked the leadership team to remind everyone of the organisation's higher purpose. This was done symbolically by drawing everyone's attention to a book which was placed in the space.

In turn, all the representatives affirmed their alignment with the purpose. This produced a noticeable shift in the atmosphere – everyone felt stronger and more focused. They were able to come closer and stand together, holding the organisation's purpose, and turning together to face in the direction of the future.





Outcome

Immediately afterwards, all participants appeared energised, unified, and encouraged by the work. During the following week they reported feeling lighter, behaving less reactively, acting more collaboratively and being more open with others and focused on stakeholder needs. For example, a large public forum that had historically been conflictual was now "more humane, which changed everything." By the six-week mark, Aimee and Eric had agreed priorities, were working more closely together, and sharing renewed vision and leadership across both their divisions. They held a highly-successful milestone workshop with 35 next-level marketing leaders across all divisions, and later a groundbreaking workshop with line leaders from every division.



CASE STUDY FACILITATOR: **Kerim Nutku**

Kerim's life purpose is "lighting up lives", supporting senior and executive leaders and their teams to supercharge their leadership power for record-breaking performance and a proud legacy. Based on 25 years' experience as high-impact individual and team coach, and leadership program facilitator, he emphasises a holistic approach — head, heart, guts, and spirit. With qualifications in psychology and business, including training in Gestalt psychotherapy and System Dynamics, he offers leading practices to help clients generate new levels of results and fulfilment.

Find out more:

v2.com.au

www.cultivatingleadership.com





MEDIATION OF A CHALLENGING WORKING RELATIONSHIP

A local government organisation was experiencing ongoing issues between Andrea, a manager, and one of her staff, Sharon. Sharon had lodged a formal complaint with HR, stating that Andrea had been bullying and harassing her. A number of meetings were held with Andrea and Sharon, a formal performance management plan was initiated by HR in conjunction with Andrea's manager and an external consultant was also engaged, however, the behaviour and escalations continued. As a final attempt to avoid termination proceedings with Andrea, the facilitator (David) was brought in to determine if the issues could be resolved.

A local government organisation was experiencing ongoing issues between Andrea, a manager, and one of her staff, Sharon. Sharon had lodged a formal complaint with HR, stating that Andrea had been bullying and harassing her. A number of meetings were held with Andrea and Sharon, a formal performance management plan was initiated by HR in conjunction with Andrea's manager and an external consultant was also engaged, however, the behaviour and escalations continued. As a final attempt to avoid termination proceedings with Andrea, the facilitator (David) was brought in to determine if the issues could be resolved.

In meeting with Andrea and Sharon separately and together, they both expressed the genuine wish to work together. They understood each other's strengths and wanted to find a way forward despite the experience of some of their encounters over the previous year. Neither wanted to leave the organisation and both felt there must be a way to resolve the challenges in their working relationship.

Insights revealed through systemic intervention

David had separate interviews with each woman to learn about their work and personal backgrounds. He formed a hypothesis that some aspect of Andrea's family or personal system was impacting on her interactions with Sharon. This was explored in a simple constellation, where Andrea was asked to look at a chair representing Sharon. Her attention, instead, was drawn to David's nearby outstretched hand, indicating a possible context overlap. She wasn't 'seeing' Sharon; but, rather, her



interactions with Sharon were being clouded by an aspect of her own personal history.

Sharon was asked to follow a similar process, but there was no evidence of context overlap when she looked at the chair representing Andrea.

Following their one-on-one meetings, HR reported back a week later that an additional 'incident' had occurred between Andrea and Sharon. A follow up session was agreed to, with both of them together. As part of this session Andrea and Sharon were open to trying a similar process to the one they had experienced in their one-to-one sessions.

Andrea and Sharon stood opposite each other making eye contact. To remove the effect of the context overlap, Andrea and Sharon performed a simple 'cleansing' process. This involved them swapping positions with each other rapidly six times on the facilitator's count. As they swapped positions each time they were asked to make eye contact. At the conclusion of this process Sharon and Andrea were bemused but both reported they felt present. Andrea stated that she could now see Sharon clearly – as if she was seeing her for the first time.

They took it in turns to state healing sentences to each other, as follows:

ANDREA: 'I can see you now, Sharon.'

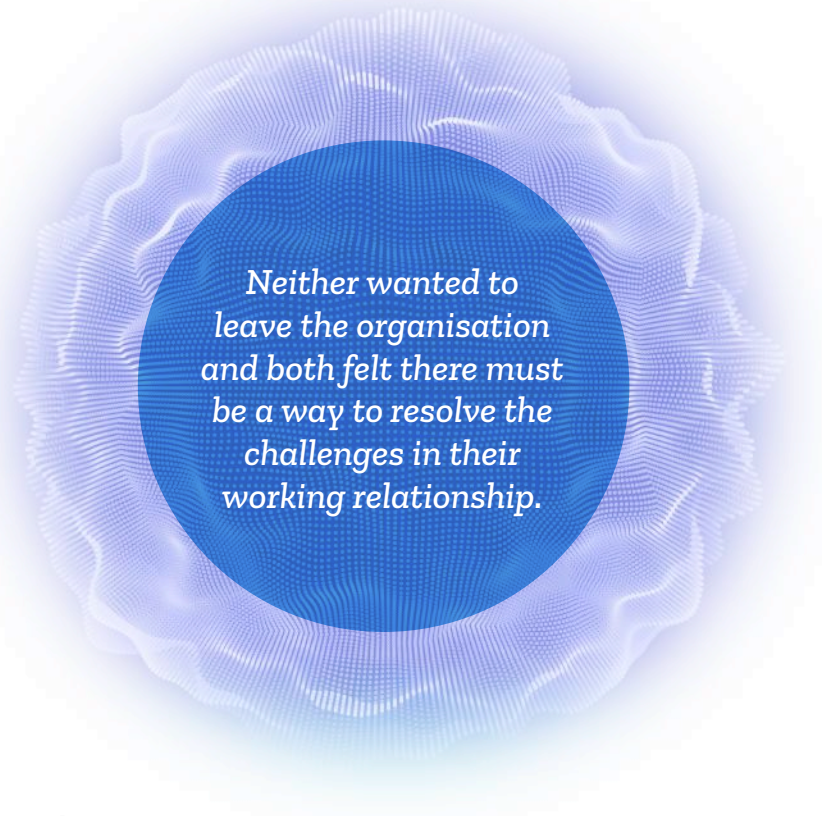
SHARON: 'I see you too, Andrea.'

ANDREA: 'Something from my past has been getting in the way.'

SHARON: 'I'm glad you can now see me.'

ANDREA: 'I'm sorry. I know it has been difficult for you.'

SHARON: 'We can work together.'





Outcome

Both Andrea and Sharon reported feeling positive at the end of the session. Andrea said that she didn't really understand what had happened but that she felt quite different. One week later, the HR contact reported that Andrea and Sharon were quietly working well together. Six months later, Andrea and Sharon were continuing to work well in their team environment with no further escalations reported.



CASE STUDY FACILITATOR: **David Fudge**

David is a director of Leading Well. Leading Well is a leadership consulting, facilitation and coaching organisation founded on the principle that the wellbeing of organisations, teams and individuals is an essential pre-requisite to achieve sustainable high performance – www.leadingwellgroup.com.au





HEALING A DYSFUNCTIONAL SYSTEM

A long-running dispute in a regional public sector human services organisation was escalating, compromising communication between key people and legal proceedings were being threatened. Recognising the growing seriousness of the issue, a facilitator was invited in to assist in resolving the conflict.

Findings from the initial briefing interviews revealed a range of complex issues. Firstly, the organisational structure was problematic, with confused lines of authority, and people with either too much or too little responsibility. There were issues between staff, such as cliques, people refusing to speak with each other and exclusion of new recruits. There was poor communication about retrenchments, poor handling of indigenous situations, and evidence of secret-keeping.

This led the facilitator to create a two-day workshop to integrate systemic constellation methodologies with wisdom and rituals from the relevant Aboriginal cultures. The aim was to bring transformation in place of stuck, painful relationship dynamics. The facilitator would work with respect for the underlying truths and explore the issue by illuminating the hidden dynamics.



Insights revealed through systemic intervention

Day one of the workshop was dedicated to modeling and building healthy system dynamics. The facilitator introduced important concepts of place, order and exchange, using exercises encouraging positive and open dialogue.

A key part of this was an initial mapping exercise. Everyone stood in relationship to each other, expressing the current team dynamics in a tableaux. Each person in the tableaux was invited to speak about their perception, experience and position. During this process it became clear that people needed to share information they had withheld. Each person took care to say things with respect and dignity, while disclosing what was needed.

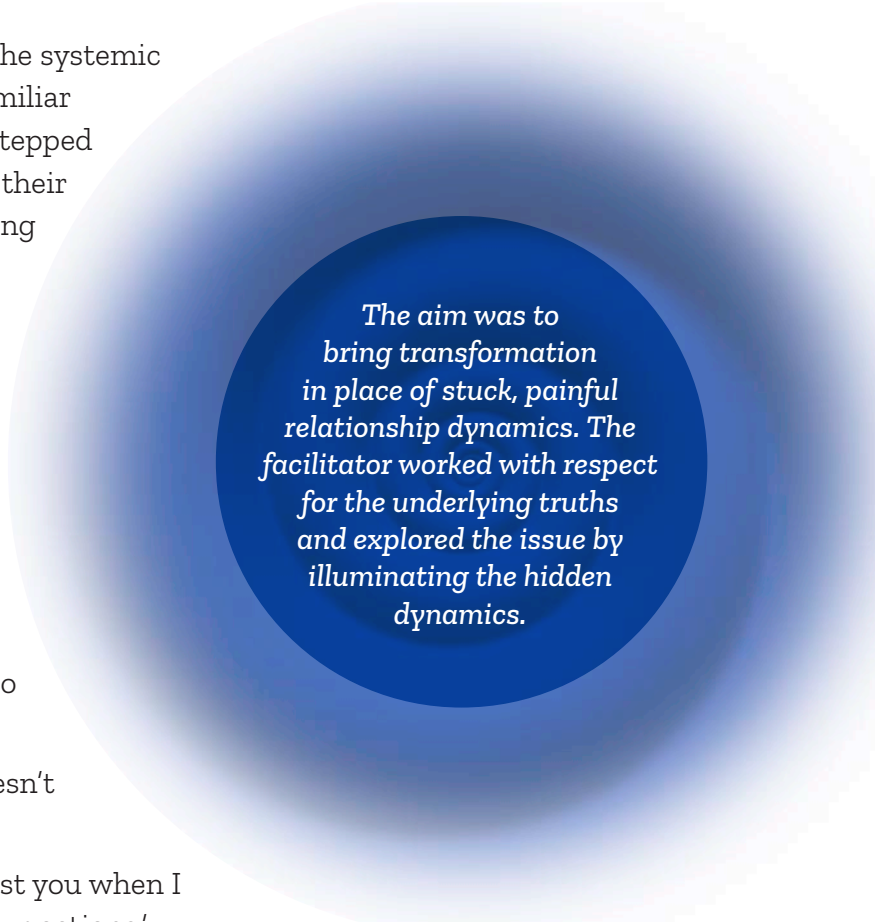
After more sessions based on the principles of healthy flow within their organisational system, they came to an important process – a ‘yarning circle’. A river stone was placed in the centre of the circle of people. Everyone was invited to



speaking in turn, according to the systemic principles they were now familiar with. One person at a time stepped forward to take the stone in their hand, speaking, then returning the stone to the centre. The facilitator guided each person to say what was true for them, rather than interpretations or stories.

Many simple truths and difficult things were shared in this moving session, such as:

- » 'My colleagues left so suddenly.'
- » 'What happened doesn't make sense to me.'
- » 'I don't feel I can trust you when I don't understand your actions.'
- » 'It hurts that you don't see how hard I try to do the right thing.'
- » 'I did it to protect his/her dignity.'
- » 'We tried hard to find a good solution.'
- » 'You are the manager; you have to make hard decisions.'
- » 'I respect your position.'



The aim was to bring transformation in place of stuck, painful relationship dynamics. The facilitator worked with respect for the underlying truths and explored the issue by illuminating the hidden dynamics.

As the yarnning circle progressed, misperceptions were corrected, errors became clear, and lessons were learned. Acceptance and respect for everyone started to emerge.

At the conclusion of this session an imaginary line was drawn on the floor on one side of the room, representing a separation between the past and the present. Another line was drawn to the right of it, representing first steps into the future. Everyone was asked to stand in the space of the past and gather their thoughts and feelings. They were to take their time, until they were ready to leave the 'stories' and drama behind in the past. They were also asked to identify what insights and value they could take forward into the future. When they were ready, they would step across the line.

Once everyone had crossed the line to the present, they were then asked to identify what actions, thoughts and feelings they needed to continue moving forward constructively. Again, when they were ready to commit, they took a few more small steps forward, over the second line, into their new beginning.



The second day of the workshop was dedicated to understanding creative tension in organisations. The facilitator taught how to create alignment to support each other's objectives and how to have courageous, authentic conversations. They focused on building and implementing a tangible vision, and holding each other accountable to it. They practised making collective and personal commitments for the future.



Outcome

Two weeks later, the facilitator was told that the team was working collaboratively in a very healthy way. Things had significantly improved, with people talking, sharing and engaging with each other, focusing on achieving important and difficult work goals together. The toxic behaviours (refusing to speak with others, gossiping, blaming and provoking) had ceased. One of the local managers was previously unable to say anything to her staff without threat of a formal complaint, but she reported that now she was having open, warm conversations with her whole team (including the person who had been most volatile).

The situation continued to improve over the following months. There were a number of challenging incidents, including work performance issues and an external mediation, but the team responded to these challenges in a new, constructive way. Their language had changed. They talked with a new level of respect for each other's contribution and place. They were eager to continue to build health across the whole system.



CASE STUDY FACILITATOR: **Sarah Cornally**

With over 30 years consulting experience at executive and board levels, Sarah has invested the last 10 years developing expertise in the multidimensional language of systems. Sarah is committed to enabling the potency of systemic intelligence to create greater capacity in today's leaders, in order to respond insightfully and effectively to uncertainty and complexity for healthy thriving systems.

Find out more: www.sarahcornally.com.



