

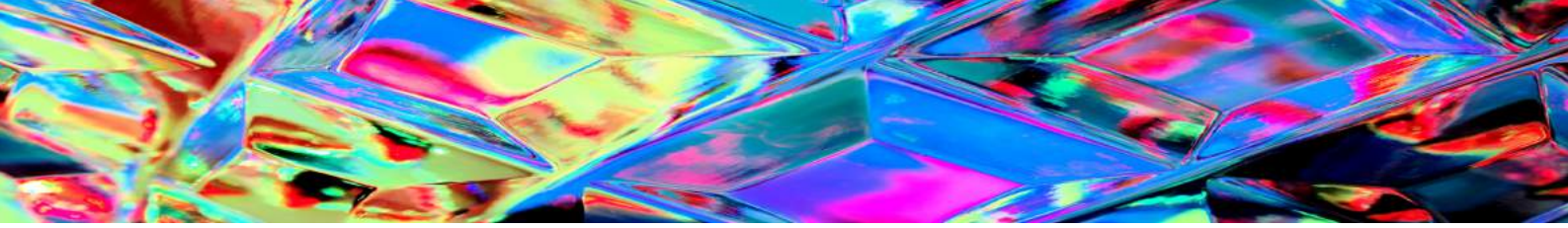


Stage SHIFT

VERTICAL HOLISTIC LEADERSHIP PROFILE

Jp Smith

24 Mar 2021



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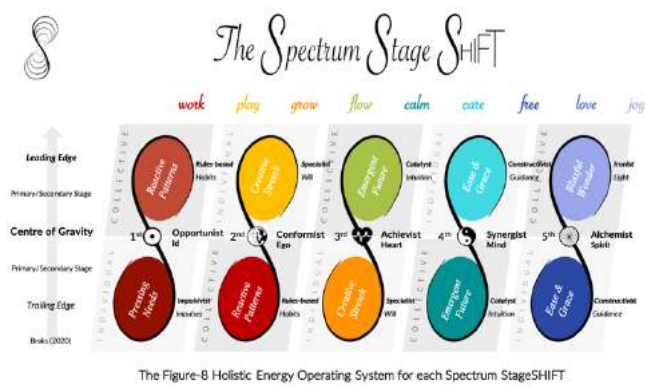
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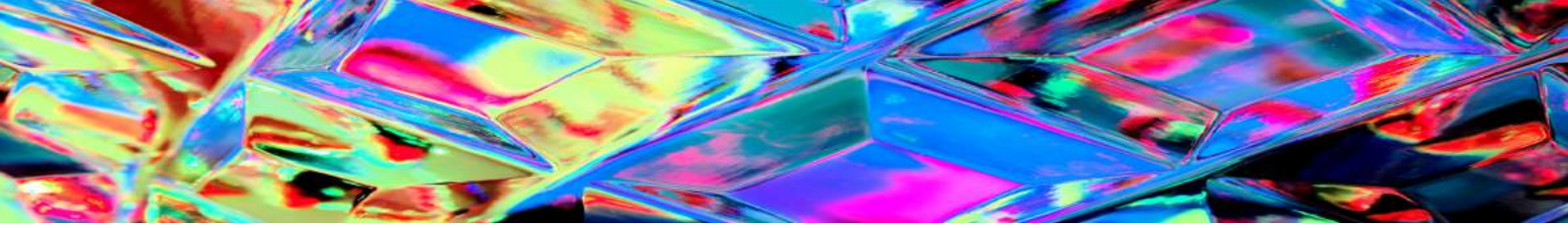
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PART I

StageSHIFT MODELS





WELCOME to StageSHIFT

Thank you for undertaking the StageSHIFT Vertical Holistic Leadership Profile. We hope you gain lots of valuable insights and understanding from your Profile to accelerate your evolving leadership journey.

StageSHIFT Purpose and Values

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

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

Our Evolutionary Values are to realise more POWERFUL leadership bringing more:

Peace | Openness | Wisdom | Evolution | Reverence | Freedom | Unity | Love into the world.

StageSHIFT Global Community of Transformative Coaches

As a global community of Synergist+ executive coaches and consultants, all certified in an intensive and extensive StageSHIFT Coaching Certification Program, we offer transformative vertical coaching in holistic leadership development and strategic enterprise evolution. Our proven evidence-based coaching and consulting approach guarantees swift StageSHIFTS to later stages including Synergist/Alchemist and Green/Teal, in just 1-2 years. From these levels we can create the world anew, resolve the serious complex problems arising from the capitalist era and build new norms of ecosystemic collaboration.

StageSHIFT has the global multilingual reach to partner with you in the evolution of your enterprise and leadership capacity. We can guide and help organisations to thrive and flourish through these tumultuous times and together ensure that our evolving digital economy serves society and preserves the earth.

Today we can also re-engineer our socio-economic institutions, policies and frameworks to realise a more sustainable, healthy, equitable and joyful world in the future. At StageSHIFT we're committed to expediting the vertical development of your leadership capacity and the evolution of your division, enterprise, organisation or community, to enable us to realise this aspirational purpose in our generation.

Dr Antoinette Josephine Braks PhD MBA.LBS

Founder of the Global StageSHIFT Coaching & Consulting Community



The Stages of Leadership Development

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

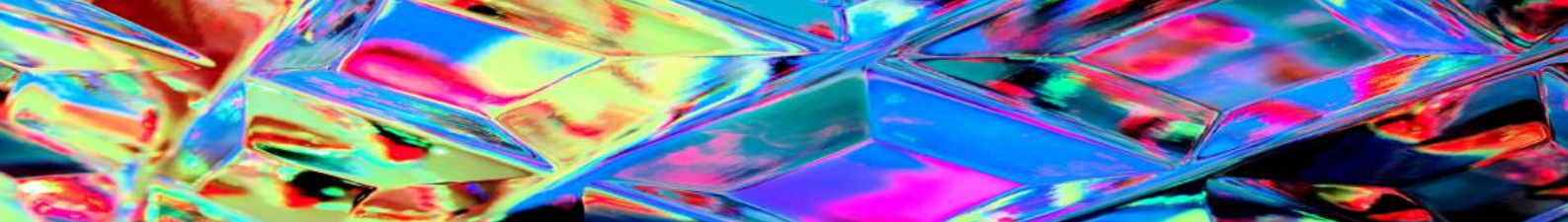


While Maslow (1962) focused on the motives to leading a more fulfilling life, Kegan (1976) identified the means. Continuing from childhood (Piaget), our adult mind makes quantum shifts in the calibration of the lens we use to perceive and understand increasing levels of complexity and subtlety across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

Loevinger (1976) embraced the more holistic concept of ego development including mind, heart and spirit, and constructed more intricate stages of vertical development. Cook-Greuter (1999) extended and enriched this stages model by identifying later stages, the successive Person Perspectives and the two-step process to adopt each one. O’Fallon (2011) has since underpinned the model with new research findings illuminating an iterative four-step sequence through Three Tiers of Transformation.

Kohlberg PHASES	Kegan Subject/Object The Mind Adult Development	Cook-Greuter Leadership Maturity Framework Mature Adult Profile MAP	Rooke Harthill Leadership Development Framework Action Logics	Torbert Global Leadership Profile Action Logics	Joseph & Joiner Leadership Agility Framework	O’Fallon STAGES International Profile	Braks StageSHIFT Vertical Holistic Leadership Model VHLP	O’Fallon TIERS
Post-Conventional	Self-Transforming	Construct-Aware			Synergist	5.0 Construct-Aware	Constructivist	METAWARE
		Self-Actualizing	Strategist	Transforming	Co-creator	4.5 Strategist	Synergist	
Conventional	Self-Authoring	Self-Questioning	Individualist	Redefining	Catalyst	4.0 Pluralist	Catalyst	SUBTLE
		Self-Determining	Achiever	Achiever	Achiever	3.5 Achiever	Achievist	
Pre-Conventional	Socialised	Skill-Centric	Expert	Expert	Expert	3.0 Expert	Specialist	CONCRETE
		Group-Centric	Diplomat	Diplomat		2.5 Conformist	Conformist	
		Self-Centric	Opportunist	Opportunist		2.0 Rule-Oriented	Rule-based	
	Impulsive	Self-Centric	Opportunist	Opportunist		1.5 Egocentric	Opportunist	
			Impulsive	Impulsive		1.0 Impulsive	Impulsivist	

The cycle of leadership development through the stages is invariable and accumulative like a set of Russian dolls. Stages cannot be skipped. Each becomes a foundation for future character development as strengths and shadow are included and transcended at each subsequent stage. The mind embraces increasing complexity; the heart appreciates greater subtlety; while the spirit uplifts personal ideology.



TRANSPERSONAL

POST-CONVENTIONAL

CONVENTIONAL

METAWARE

SUBTLE

CONCRETE

joy



Holist
'inspires all'

Infinity and eternity
Emptiness and fullness
Lightness, timeless, boundless
Oneness, formless, emptiness
Fullness of love experience
Luminous self as spirit

Ironist
'generates love'

Fullness of compassion
Perceives passing of ages
Timely world-centric action
Sees impact of butterfly wings
Cosmic perspective
Surrenders the self



love

free



Alchemist
'evolves society'

Life is a theatre
Empty open mind
Integrates material and spiritual
Sees repeating eternal patterns
Order and mess are okay
Social transformation

Constructivist
'reframes reality'

Disrupts the status quo
Takes reverent care of life
Constructs reality with thought
Sees own projections instantly
Perceives eras of civilisation
Collective shadow arises



care

calm



Synergist
'leads evolution'

Sustainable change
Mutual collaboration
Orchestrated and systemic
Vigilant and vulnerable
Purposeful fulfilment
Sets trust as default

Catalyst
'is authentic'

Life is a journey
Reflective and insightful
Collaborative change agent
Interweaves across stakeholders
Generates unique perspectives
Follows intuition over logic



flow

grow



Achievist
'gets results'

Sets and juggles priorities
Positive, pragmatic planner
Life is about striving and winning
Wants "More" and always "Busy"
Proactively achieves team goals
Feedback fosters better results

Specialist
'develops skills'

Life is a major effort
Logic and expertise prevail
Quality continuous improvement
Highly critical and perfectionist
Always "Not good enough"
Takes feedback personally



play

work



Conformist
'by the rules'

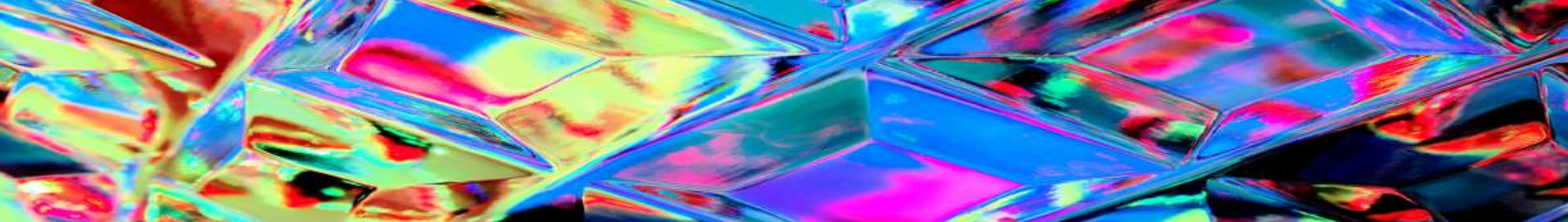
Life is a struggle
Right and wrong
Enjoys belonging
Follows directives
"Us" and "them"
Takes zero-risk

Opportunist
'on the take'

Sees new opportunities
Creates new ideas
Acts in self-interest
Closed to feedback
Life is threatening
Attacks to defend



try



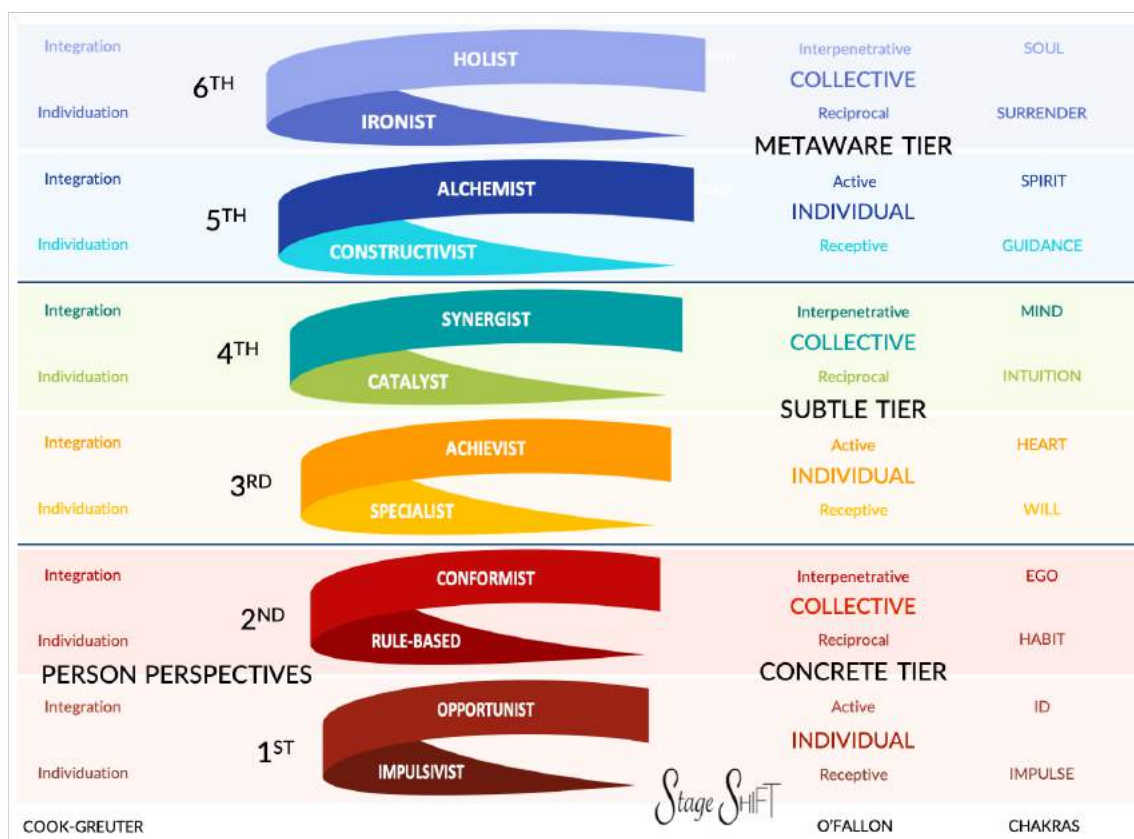
The 2-Step Square Dance of Evolution

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

- The stages of leadership development with a synthesis of successive human faculties
- The two-step square dance in the Spectrum StageSHIFT to the next Centre of Gravity
- Self-Expression and Life Experience illuminating the impact of Spectrum StageSHIFTS.

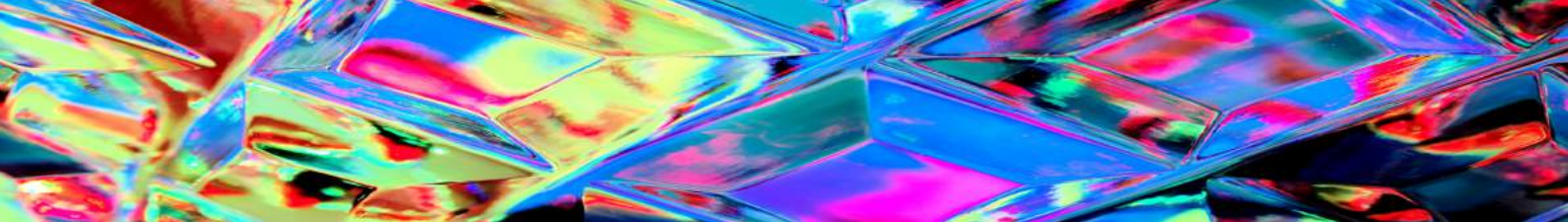
The two-steps taken to adopt each new Person Perspective are Individuation and Integration. A person is most confident when they have their Centre of Gravity in the second Integration step of development. It is then that they can translate their expanding awareness into inspired action such as driving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

These two steps alternate between a primary Individual orientation and a primary Collective focus. They form the StageSHIFT 2-Step Square Dance of Vertical Development. Most people enjoy a spectrum of four stages of development, two of which are Individually oriented, and two Collective.

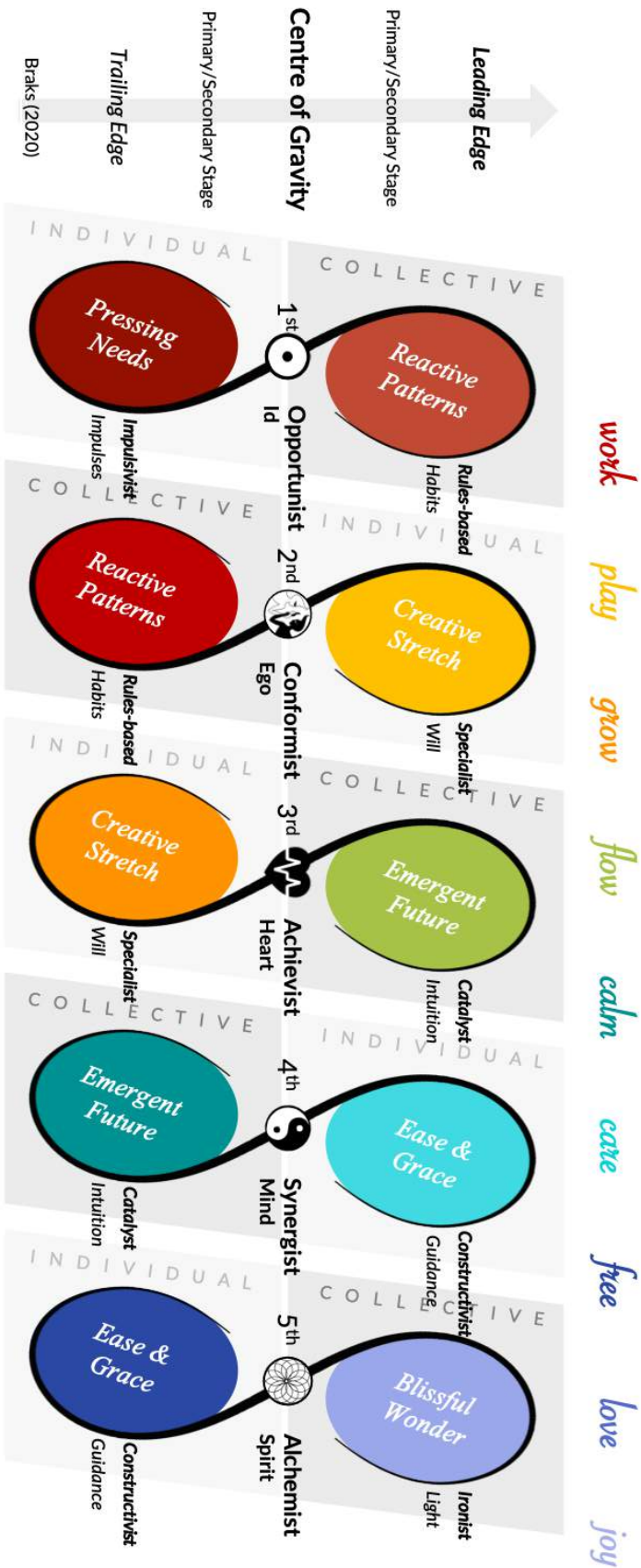


This 2nd cycle iterates through the three Tiers: Concrete, Subtle and MetAware. The 1st step in the Individual zone is defined as Receptive; the 2nd step as Active. The 1st step in the Collective zone is termed Reciprocal; and the 2nd step is Interpenetrative. Vertical leadership development is more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

Further, our life experience shifts with our Centre of Gravity. At Opportunist, we survive and struggle. At Conformist, we struggle and strive. At Achievist, we strive and thrive, while at Catalyst, we thrive and flourish. At Synergist we flourish with ease and grace; and at Alchemist, we're at ease with surrender.



The Spectrum Stage SHIFT



The Figure-8 Holistic Energy Operating System for each Spectrum StagesHIFT

The Stages of Enterprise Evolution

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

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



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

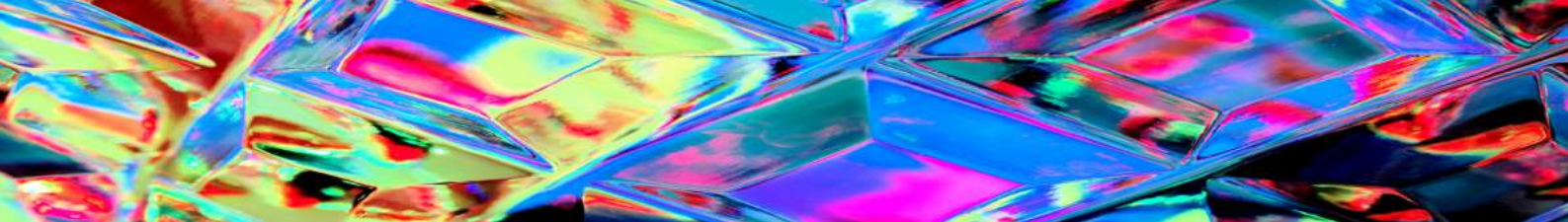
At Green, there is lift-off. With a shared visionary direction and agreed values, everyone flies together to realise bolder audacious goals within an agile network. The business becomes a more conscious enterprise where attention is given to the engagement, participation and development of everyone involved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

The enterprise then evolves to Teal as it adopts a spaceship hub model where people are liberated and trusted to make most decisions in a decentralised yet integrated complex adaptive ecosystem. The open systemic governing context and the purposeful aspirational intent to serve society at large holds the tapestry together while everyone finds a way to make their most meaningful contributions.

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

LATER STAGE ENTERPRISES ACCOMMODATE A SPECTRUM OF STAGES

Enterprises accommodate a spectrum of stages. People at operating levels contribute most efficiently at Specialist/Achievist within an Amber context, while business unit leaders at mature Achievist can focus their teams on realising shared outcomes at Orange. Any roles requiring broad internal and external stakeholder engagement and agile process-based collaborative innovation need change leaders and culture champions at Catalyst within a Green context. Highly effective regional and divisional C-suite leaders are Synergists who lead collaboration across diverse functions and regions gradually evolving the enterprise to purposeful Teal, while global C-suite leaders resolving today's wicked problems are most effective from the ecosystemic stage of Alchemist within a free-wheeling Turquoise context.



The Vertical Holistic Leadership Model (VHLM)

The StageSHIFT Leadership Model interconnects Vertical Leadership Development through the stages, with Holistic Leadership Development in terms of will, heart, mind and spirit. These four dimensions are summarised respectively as Action Orientation, Emotional Awareness, Mindful Attention and Spiritual Congruence: AQ, EQ, MQ and SQ. Together they form Leadership Presence, LQ.

LQ	Leadership Presence	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist
AQ	Action Orientation	Doing	Performing	Instigating	Generating	Cultivating	Visionary
EQ	Emotional Awareness	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion
MQ	Mindful Attention	Thinking	Planning	Interpreting	Integrating	Transcending	Wisdom
SQ	Spiritual Congruence	Creating	Designing	Innovating	Transforming	Inspiring	Wizardry
	Relevant Role Level	S Self	M Manager	L Leader	XL Executive	XXL Group Exec	XXXL Global

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

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

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

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

The four dimensions of leadership are each split into five key capabilities and two forms of shadow as shown in the Table below. Each capability is defined at each stage of vertical development. For instance, there are six statements for Proactive (AQ) to reflect the spectrum of vertical stages of development shown above. There are three statements for each Shadow element calibrated at Low, Medium and High.

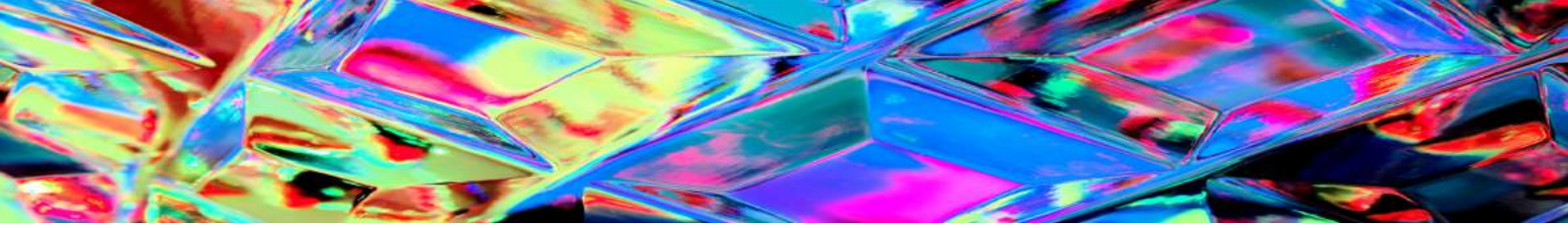
LQ	AQ	EQ	MQ	SQ
Leadership Presence	Action Orientation	Emotional Awareness	Mindful Attention	Spiritual Congruence
Mindset	Agile	Inclusive	Balanced	Energetic
Motive	Proactive	Developing	Purposeful	Innovative
Meme	Focused	Engaging	Disciplined	Courageous
Means	Accountable	Respectful	Decisive	Genuine
Mode	Resilient	Trusting	Influential	Perceptive
<i>Offence</i>	<i>Forceful</i>	<i>Unkind</i>	<i>Adamant</i>	<i>Defiant</i>
<i>Defence</i>	<i>Careless</i>	<i>Elusive</i>	<i>Insincere</i>	<i>Compliant</i>



PART II

YOUR StageSHIFT PROFILE





Your StageSHIFT Profile

Over the next few pages, you'll find the outcomes of your individual self-assessment.

Your Vertical Holistic Leadership Profile

The first is a circular chart of your summarised Leadership Presence. The quantitative rating based on your weighted average score of your assessments of each capability and shadow element.

Your Spectrum of Stages, Window/Shadow

The spectrum of stages around your quantitative rating are shown on a bar graph followed by Tables that order your capabilities and shadow elements from highest to lowest ratings.

It's valuable to identify themes that resonate with you and/or recur, and to highlight surprises.

This is followed by two Tables outlining your stage assessments for the capability statements associated with each capability listed above and corresponding shadow elements.

From this you can identify trend lines and compare your ratings on each type of intelligence (Q) indicating your leadership style preferences.

Your Strengths, Stressors, Blind Spots & Stretches

Next are four separate Tables setting out your top seven Strengths, Stressors, Blind Spots and Stretches. These are based on your assessments for each capability and shadow element.

From these you can gain a greater understanding of the themes and patterns in your assessments.

There will be particular words or phrases that especially resonate with you. These are important to take note of. You can record these items as they come up in the Mind Map Matrix that follows.

Mind Map the Emergent Themes in Your Profile

Take a much larger piece of paper if you prefer to fully mind map your discoveries from your StageSHIFT Vertical Holistic Leadership Profile. While the report is analytically robust, it is your resonance and dissonance with assessments, from which you will gain the most valuable insights.

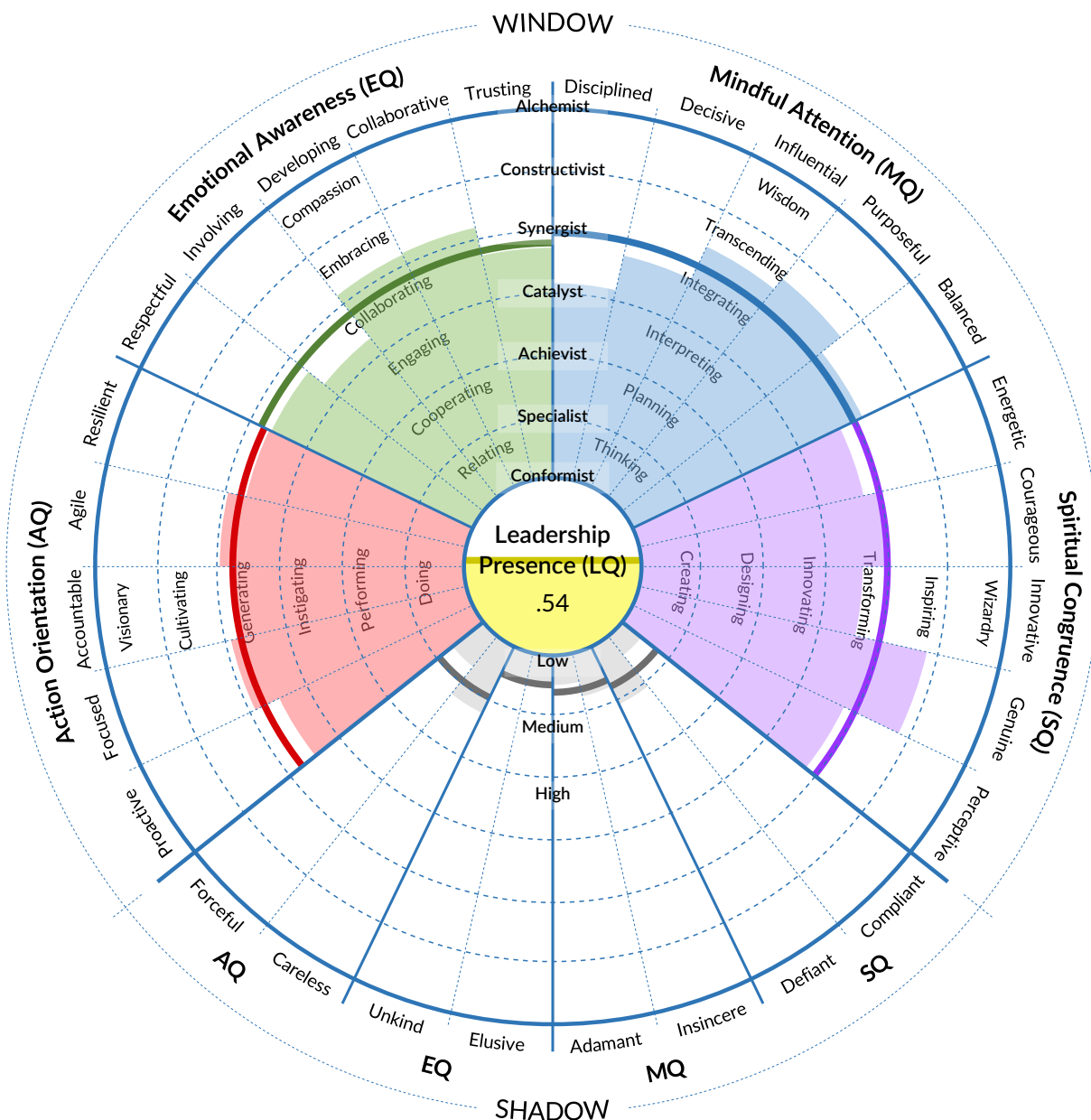
Your Evolving Leadership Aspirations

Complete the review of your Profile Report by setting out your evolving leadership aspirations. It is very valuable to share both your Mind Map of personal findings and your Leadership Aspirations with your StageSHIFT Coach at the beginning of your Discovery Debrief. This will lead you into a shared inquiry, more revelations and new opportunities to explore and navigate your vertical evolution.



Your Vertical Holistic Leadership Profile

Jp Smith 24 Mar 2021

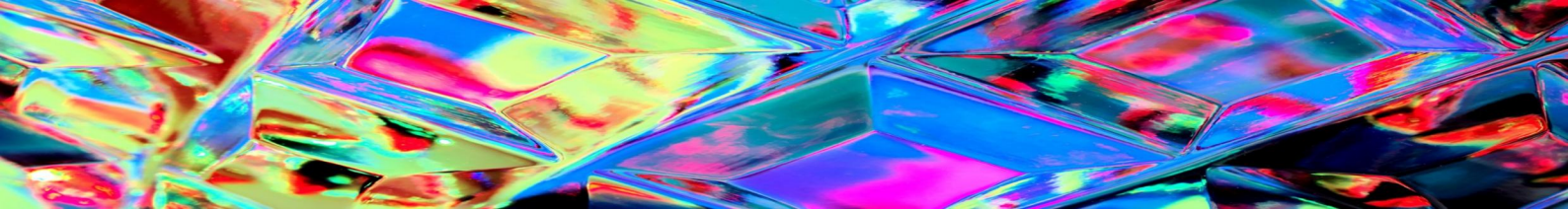


Legend

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

Your Weighted Average Rating Summary

	AQ	EQ	MQ	SQ	LQ	Stage
Window Rating	.63	.64	.66	.67	.65	Catalyst - Achievist
Shadow Rating	.15	.08	.10	.12	.11	



Your Window & Shadow Dimensions

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



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

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

Dimension	Window Element	Avg Rating*
SQ	Genuine	0.80
MQ	Purposeful	0.76
MQ	Influential	0.72
EQ	Collaborative	0.70
EQ	Developing	0.70
MQ	Balanced	0.69
SQ	Courageous	0.67
AQ	Agile	0.66
AQ	Focused	0.65
SQ	Perceptive	0.64
SQ	Energetic	0.62
MQ	Decisive	0.62
EQ	Trusting	0.62
AQ	Accountable	0.62
AQ	Resilient	0.61
EQ	Respectful	0.61
SQ	Innovative	0.60
AQ	Proactive	0.58
EQ	Involving	0.55
MQ	Disciplined	0.53

Dimension	Shadow Element	Avg Rating*
<i>Offence</i>		
SQ	Defiant	0.17
AQ	Forceful	0.11
MQ	Adamant	0.08
EQ	Unkind	0.08
<i>Defence</i>		
AQ	Careless	0.20
MQ	Insincere	0.12
EQ	Elusive	0.08
SQ	Compliant	0.07

* The Average Rating of the Window elements is based on the weighted average score of 5 capability statements at progressive stages for each element. The score reflects your response to each statement, i.e. Not Yet, Occasionally, Sometimes, Frequently, Mostly or Always. The Average Rating of the Shadow elements is based on 3 statements at Low, Medium and High levels for each element.

Your Window Dimensions

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

Stage	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist	
AQ	Doing	Performing	Instigating	Generating	Cultivating	Visionary	Avg Rating
Proactive	4	2	3	4	3	2	0.58
Focused	4	4	3	2	3	4	0.65
Accountable	3	3	4	4	2	3	0.62
Agile	4	4	4	4	3	2	0.66
Resilient	3	3	3	2	3	4	0.61
AQ Avg							0.63
EQ	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion	Avg Rating
Respectful	4	4	3	2	3	3	0.61
Involving	4	4	3	3	2	2	0.55
Developing	4	4	2	4	3	4	0.70
Collaborative	4	3	3	4	3	4	0.70
Trusting	4	4	4	3	3	2	0.62
EQ Avg							0.64
MQ	Thinking	Planning	Interpreting	Integrating	Transcending	Wisdom	Avg Rating
Disciplined	2	4	2	3	3	2	0.53
Decisive	4	3	2	4	3	3	0.62
Influential	4	4	3	4	4	3	0.72
Purposeful	3	3	4	4	4	4	0.76
Balanced	3	4	4	4	3	3	0.69
MQ Avg							0.66
SQ	Creating	Designing	Innovating	Transforming	Inspiring	Wizardry	Avg Rating
Energetic	4	4	4	3	3	2	0.62
Courageous	3	4	3	3	3	4	0.67
Innovative	4	3	2	2	3	4	0.60
Genuine	4	4	4	4	4	4	0.80
Perceptive	4	4	3	3	4	2	0.64
SQ Avg							0.67
Overall							
Window Avg							0.65

The individual Ratings of the Window elements reflects your response to each statement (5 per element), i.e. Not Yet (0), Occasionally (1), Sometimes (2), Frequently (3), Mostly (4) and Always (5).

Your Shadow Dimensions

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

Depth	Low	Medium	High	
AQ				
Forceful	Driven	Demanding	Domineering	Avg Rating
Offence	2	0	2	0.11
Careless	Inattentive	Irresponsible	Negligent	Avg Rating
Defence	1	1	4	0.20
AQ Avg				0.15
EQ				
Unkind	Negative	Critical	Arrogant	Avg Rating
Offence	1	1	1	0.08
Elusive	Evasive	Aloof	Remote	Avg Rating
Defence	1	1	1	0.08
EQ Avg				0.08
MQ				
Adamant	Obstinate	Stubborn	Autocratic	Avg Rating
Offence	1	1	1	0.08
Insincere	Deceptive	Devious	Manipulative	Avg Rating
Defence	1	1	2	0.12
MQ Avg				0.10
SQ				
Defiant	Adverse	Oppositional	Hostile	Avg Rating
Offence	2	1	3	0.17
Compliant	Amenable	Pleasing	Passive	Avg Rating
Defence	1	2	0	0.07
SQ Avg				0.12
Overall				
Offence Avg Rating				0.11
Defence Avg Rating				0.12
Shadow Avg				0.11

The individual Ratings of the Shadow elements reflects your response to each statement (3 per element), i.e. Not At All (0), Occasionally (1), Sometimes (2), Frequently (3), Mostly (4) and Always (5).



Your Top Seven Strengths

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

<i>Statement</i>	<i>Window Element</i>	<i>Stage</i>	<i>Rating</i>
I inspire a deep concern for the long term impact of strategic decisions on the community, planet and all of life	SQ/ Genuine	Alchemist/ Wizardry	4
I am a path-finding pioneer instigating innovative systemic solutions to overcome twentieth century problems	SQ/ Innovative	Alchemist/ Wizardry	4
I hold an expansive space so others access their courageous authenticity to uphold high standards and principles	SQ/ Courageous	Alchemist/ Wizardry	4
I am deeply committed to leading the creation of a more sustainable healthy equitable and joyful world for all	MQ/ Purposeful	Alchemist/ Wisdom	4
I lead a continuous dialogue with the system to advance its design while developing trust within the group	EQ/ Collaborative	Alchemist/ Compassion	4
I identify and inquire into inner and outer group and system blockages and tensions that inhibit progress	EQ/ Developing	Alchemist/ Compassion	4
I courageously attest to and act on universal principles to lead to greater justice and equity in the world	AQ/ Resilient	Alchemist/ Visionary	4

My Reflections and Revelations

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

How would you articulate the strengths of your leadership capacity?

Are there ways you could leverage these strengths further?



Your Top Seven Stressors

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

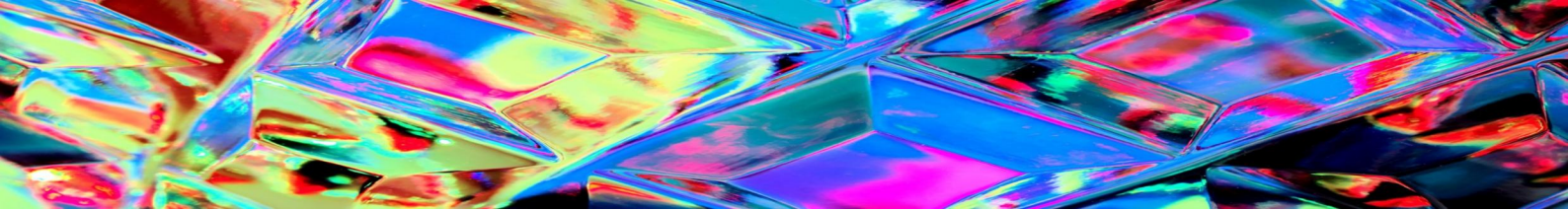
<i>Statement</i>	<i>Shadow Element</i>	<i>Depth</i>	<i>Rating</i>
I can't give my work the attention it deserves to produce quality outcomes as I have just too much to do	AQ/ Careless	High/ Negligent	4
I can be argumentative and antagonistic towards others if they're untrustworthy or unsupportive of me	SQ/ Defiant	High/ Hostile	3
It's important to be calculating around some people I work with as I cannot trust them to do the right thing	MQ/ Insincere	High/ Manipulative	2
I tend to tell people what to do as I know exactly how to get things done most efficiently and effectively	AQ/ Forceful	High/ Domineering	2
I prefer to please others so that they accept and appreciate me although I do complain about them later on	SQ/ Compliant	Medium/ Pleasing	2
I tend to respond adversely to positive or optimistic people as it's more useful to see the worst-case scenario	SQ/ Defiant	Low/ Adverse	2
I drive myself and others really hard to do the very best we can and as much as we can in the time we have	AQ/ Forceful	Low/ Driven	2

My Reflections and Revelations

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

How would you articulate your shadow tendencies?

What do you suspect is the source of this shadow?



Your Top Seven Blind Spots

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

<i>Statement</i>	<i>Window Element</i>	<i>Stage</i>	<i>Rating</i>
I respect safety standards, take time to pause during my work day, and balance work and personal time	MQ/ Disciplined	Specialist/ Thinking	2
I set stretch goals with courage and conviction and empower others to seize advantageous opportunities	AQ/ Proactive	Achievist/ Performing	2
I perceive and resolve challenging interpersonal dynamics to stimulate deeper, more authentic engagement	EQ/ Developing	Catalyst/ Involving	2
I balance current resources with competing demands to produce a safe, secure and sustainable workplace	MQ/ Disciplined	Catalyst/ Interpreting	2
I make astute strategic decisions to take advantage of new opportunities to improve future outcomes	MQ/ Decisive	Catalyst/ Interpreting	2
I encourage entrepreneurial spirit and act decisively on original, imaginative solutions to increase value creation	SQ/ Innovative	Catalyst/ Innovating	2

My Reflections and Revelations

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

How would you articulate your blind spots as a leader?

What could you develop more conscious awareness of?



Your Top Seven Stretches

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

<i>Statement</i>	<i>Window Element</i>	<i>Stage</i>	<i>Rating</i>
I capitalize on market trends and new insights to inspire others and generate enhanced community wellbeing	AQ/ Focused	Synergist/ Generating	2
I sponsor adventurous, new strategic initiatives to stimulate innovation and generate systemic transformation	AQ/ Resilient	Synergist/ Generating	2
I engage expansively beyond the organization to generate and guide a complex collaborative network	EQ/ Respectful	Synergist/ Collaborating	2
I invest in blue horizon thinking to ignite new and visionary ways to meet emerging community needs	SQ/ Innovative	Synergist/ Transforming	2
I invite others to take radical accountability for the richness of their lives to foster their vertical growth	AQ/ Accountable	Constructivist/ Cultivating	2
I attune others to becoming more aware of deeper collective and/or intergenerational shadow	EQ/ Involving	Constructivist/ Embracing	2
I engage others to transcend industrial paradigms and shine light on the emergence of a better future	AQ/ Proactive	Alchemist/ Visionary	2

My Reflections and Revelations

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

Which would you like to focus on to develop your leadership capacity?

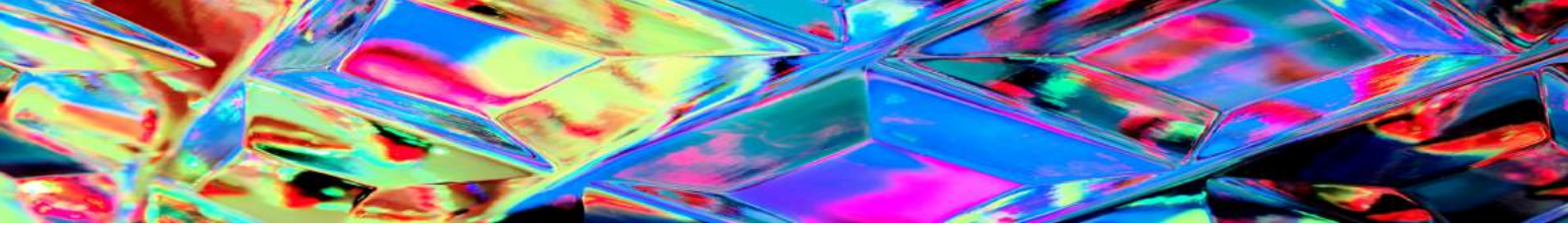
How might you go about building your capacity in these areas?



MIND MAP THE PREVAILING THEMES

	STRESSORS	BLIND SPOTS	STRENGTHS	STRETCHES
SQ				
MQ				
EQ				
AQ				

CONFORMIST ~ SPECIALIST ~ ACHIEVIST ~ CATALYST ~ SYNERGIST ~ CONSTRUCTIVIST ~ ALCHEMIST



Your Evolving Leadership Aspirations

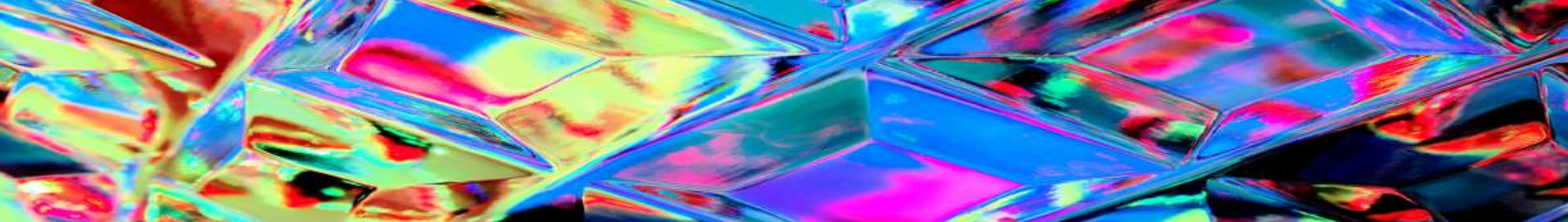
STRENGTHS to Extend

STRESSORS to Express

BLIND SPOTS to Explore

STRETCHES to Expand

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



STAGE & STYLE FIT WITH ROLE LEVEL & TYPE

Take a moment to situate your understanding of your primary Stage and preferred Style (top Qs) with your Role Level and Role Type respectively. A 70% match with your Stage and Style leaves room for evolution with coaching support. This type of person-role match, leadership stage and style with role level and type, will lead to enhanced wellbeing, optimal effectiveness and career fulfilment.

Role Level by Primary Stage is clear. Roles can always flex to optimise and amplify the leadership capacity and evolution of its occupant. The enterprise context becomes the vehicle for personal growth. A leader's level of stage development predicts their 360-assessed level of leadership effectiveness.

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

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

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

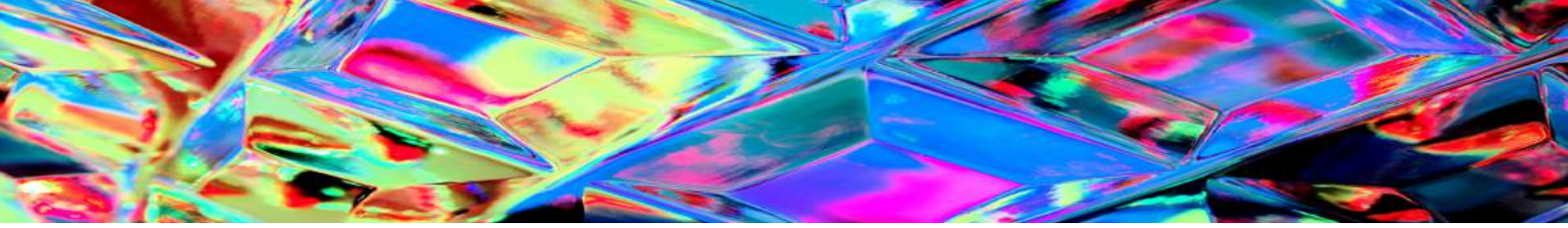
To check if your Centre of Gravity, your default automated operating system, is at Achievist or Synergist, the most common dilemma given our prevailing spectrum of stages today, consider the following:

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

When anchored at Synergist, we shape and engineer our context. Because we are now self-validating, we reset the standards, boundaries, priorities and norms for all the people we lead and encounter. We model more principled and purposeful cultural memes that others appreciate and respect us for.

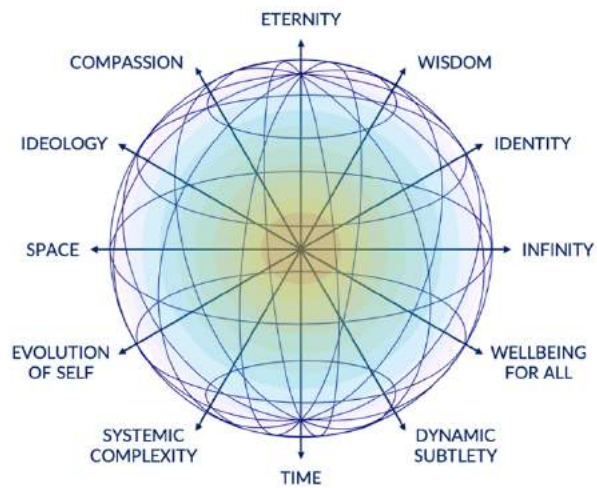
Our decisions and actions are designed to generate eco-centric community-based mutually beneficent outcomes that serve society as a whole over the long term. The short-term gratification of profits is yielded to the long-term need for more sustainable, healthy, equitable and joyful shared outcomes. We uplift the culture; we expand the playing field; and we co-create a new way of living.

To what extent do you currently navigate your work context or actively shape it to enhance outcomes?



PART III

SPECTRUM StageSHIFTS





SHIFTING THROUGH THE STAGES

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

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

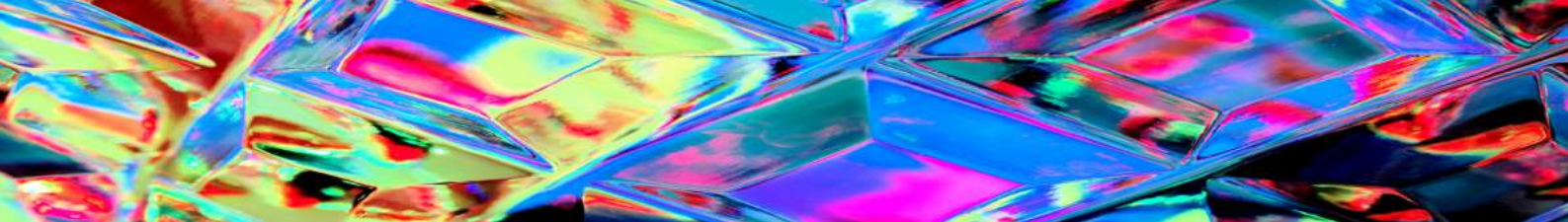
PERSON PERSPECTIVES

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

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

INTENTION & ATTENTION

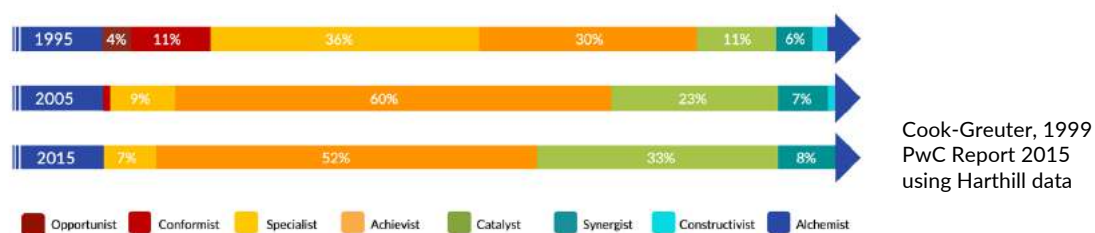
At each stage there is a shift in what we value most, what we wish for, how we think, what we attend to and how we exercise leadership. Our sphere of awareness, interpretation and understanding grows to automatically comprehend increasing complexity due to our familiarity with multiple complex adaptive systems, to appreciate greater subtlety due to our deeper understanding of people psychodynamics, and to uphold a more inspiring ideology based on universal principles and mutual benefit.



THE PACE OF LATER STAGE DEVELOPMENT

Research indicates that Synergist leaders are the type of leaders we need in the world today. Only at this level are leaders able to cut through complexity, transcend uncertainty and hold the strategic clarity to recreate an ecosystemic socioeconomic infrastructure where everyone is able to thrive and flourish. They have the power to lead the generation of a more sustainable, healthy, equitable and joyful world for all.

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



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

StageSHIFT found that the participants in its research study all shifted a full stage in one year. 80% of participants shifted a single stage to Catalyst, and 20% shifted two stages to Synergist, after just eight coaching sessions in one year. StageSHIFT Coaching offers a 120% StageSHIFT ROI, four times the 27% documented above. It accomplished this in eight 90-mins coaching sessions spread throughout the year i.e., a total of two days instead of 20.

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

We conclude that conventional leadership programs have proven to be insufficient to generate Synergist leadership capacity because:

1. Even advanced leadership programs and assessments only stretch to the Catalyst stage
2. Conventional developmental coaching relies mainly on the coachee's current perspective
3. Leadership development is separated from organisational development/evolution, and
4. Intensive leadership development programs take place offsite away from the workplace.

Uncover the StageSHIFT research findings and unlock the secrets to your later stage development.



SHIFTING OUR CENTRE OF GRAVITY

The key StageSHIFTS needed today are from a COG at Achievist to Synergist, and from a COG at Synergist to Alchemist. We need more Synergists to purposefully lead enterprises and regions, divisions and functions in organisations based on principles, and Alchemists to forge and lead global ecosystems.

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

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

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

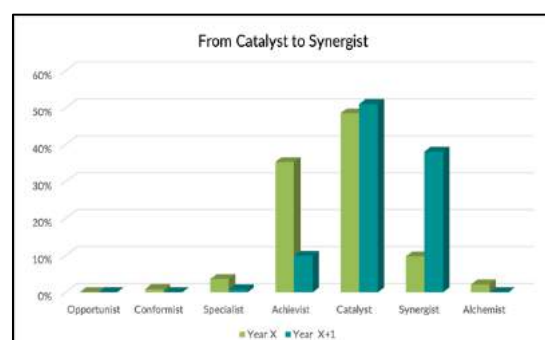
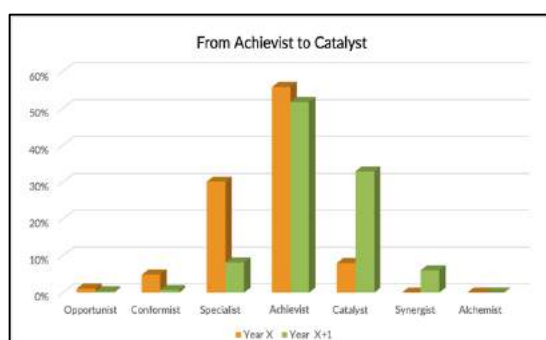


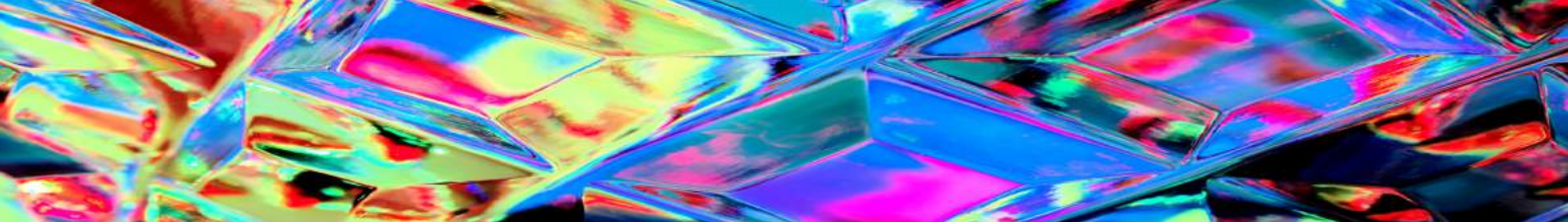
FROM ACHIEVIST TO SYNERGIST

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

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

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



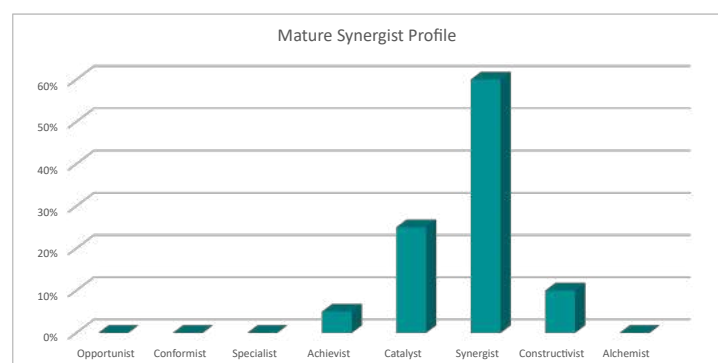


From a holistic view, as the heart opens at Achievist to not only follow our heart's desires but to embrace and genuinely respect all others, we connect with the 4th Person Perspective at Catalyst. Our inner world opens up to include the disparate selves within, our shadow, and our outer world opens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

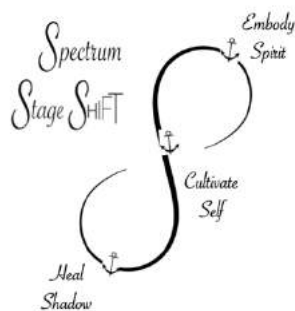
Intuition comes alive to foster our insight and inquiry, and the heart is invited to heal emotional wounds while the mind reframes limiting beliefs, to expand our integrated leadership presence at Synergist. This vertical development is the Hero's Journey of shadow crashes, dramas and dilemmas.

From a strategic perspective as outlined above under SELF-ESTIMATION, the locus of control shifts from negotiating and navigating the surrounding context, to our inner world of intrinsic purpose, universal principles and conscious evolution to lead inter-systemic transformation without invitation or permission.

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



FROM SYNERGIST TO ALCHEMIST



The Spectrum StageSHIFT to Alchemist works in a similar fashion but shifts from the individual to the collective. We begin to embody increasing attunement to the 6th person MetAware collective perspective at Ironist by dancing ever more in synch with the universe.

We cultivate our new identity at Synergist by leading wider and deeper transformations of the inter-systemic collective to forge broad conscious ecosystems beyond enterprise boundaries. Further we begin to appreciate and heal collective cultural and ancestral shadow to liberate ourselves and future generations from the past.

The spectrum of stages leading into a COG at Alchemist includes Synergist, Constructivist, Alchemist, Ironist and Holist. There is great strength in the Individual Alchemist optimising the Synergist Collective.

While the evolution to a mature 4th Person Perspective at Synergist can be correlated with a journey across mountains and valleys with adventures and dramas i.e., the Hero's Journey, the evolution to a mature 5th Person Perspective approximates a voyage to the bottom of the sea and back. It is an immersion in MetAwareness without being able to do or think. The springboard is often what is termed as the dark night of the soul. It seems that only by sitting and merging with deep despair and collective grief in a detached fashion, can we rise again as the phoenix to realise new heights of inspired action.

The quantum shift in the strategic leadership capacity from Synergist to Alchemist is essentially a shift from leading, holding and sustaining the Intersystemic context at Synergist, to designing, engineering and finetuning a more liberating entire ecosystemic context at Alchemist. This enables Synergist leaders and their people to graciously evolve and contribute meaningfully to purposeful principled endeavours.



The StageSHIFT KEYS WITHIN 'SHIFT'

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

- Strategic Enterprise Evolution integrated with Vertical Leadership Development
- Holistic Identify of the Self based on Multiple Lines of Vertical Development
- Inspiring Cultivation of the Self by Embodying Spirit and Healing Shadow
- Force of Nature organically Expanding our many faceted Sphere of Evolution
- Transformative Coaching focused on Expansive Dialogical Meaning-Making

STRATEGIC ENTERPRISE EVOLUTION



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

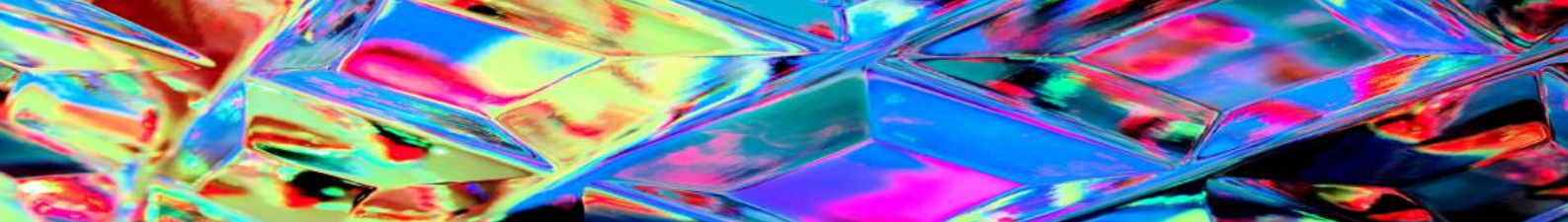
By re-shaping the structural context rather than simply navigating it, the Synergist leadership assessed awareness is activated and becomes embodied. It is this transforming leadership capacity that is the trademark of a Synergist.

HOLISTIC LEADERSHIP EVOLUTION

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

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

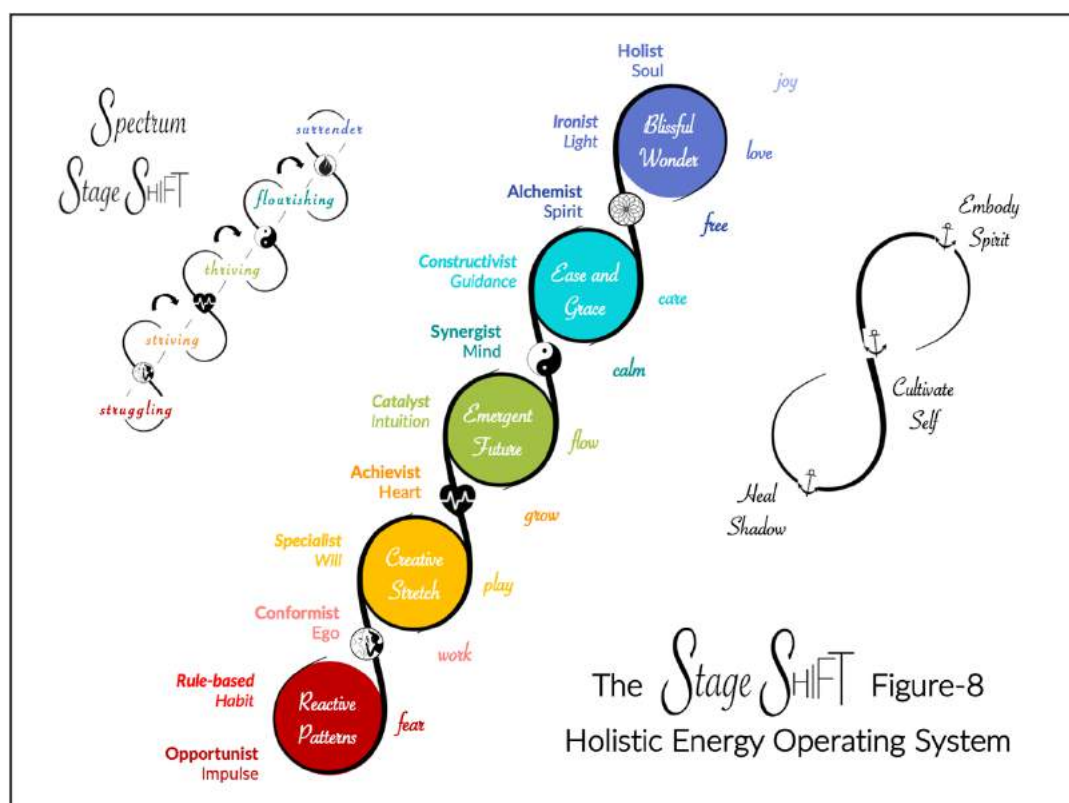
LQ	Leadership Presence	Specialist	Achievist	Catalyst	Synergist	Constructivist	Alchemist
AQ	Action Orientation	Doing	Performing	Instigating	Generating	Cultivating	Visionary
EQ	Emotional Awareness	Relating	Cooperating	Involving	Collaborating	Embracing	Compassion
MQ	Mindful Attention	Thinking	Planning	Interpreting	Integrating	Transcending	Wisdom
SQ	Spiritual Congruence	Creating	Designing	Innovating	Transforming	Inspiring	Wizardry
	Relevant Role Level	S Self	M Manager	L Leader	XL Executive	XXL Group Exec	XXXL Global



INSPIRING SELF EVOLUTION

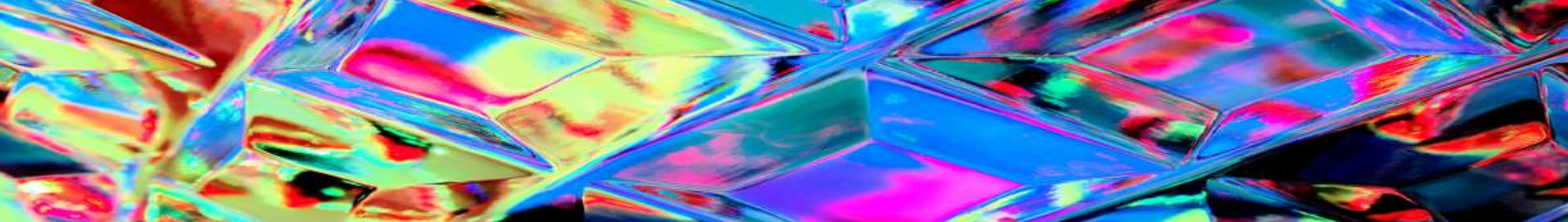
The Spectrum StageSHIFT is a new approach to vertical development. Instead of seeing it as a stage-by-stage linear process, it's more realistic to view it as a Spectrum StageSHIFT from one Centre of Gravity (COG) to the next. It's impossible to anchor in an individuation stage, the first step in each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

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



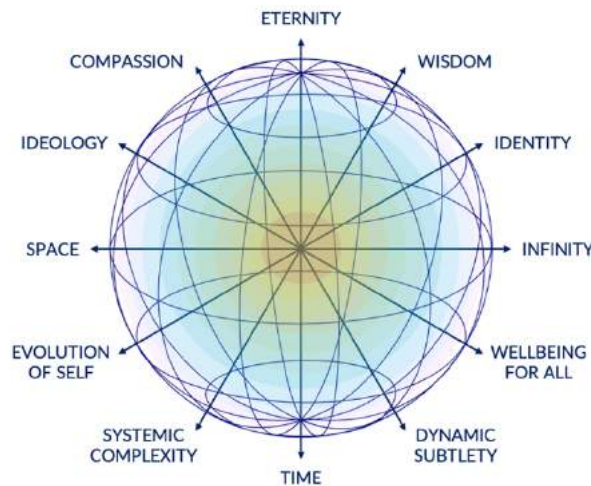
We also cultivate our present self by expanding our conscious awareness and paying attention to our self-expression in order to develop leadership presence in terms of kindness, mindfulness and congruence. By cultivating our courageous integrity, we become more authentic and trustworthy. We gradually broaden our leadership capacity and enhance our personal wellbeing and the positive ripple effect we have on others at the Centre of Gravity of our vertical development.

Thirdly, we explore the psychodynamics of reactive intrapersonal and interpersonal situations in order to appreciate and heal our shadow. Over time, we integrate our disparate selves and empty our mind to arrive at a continuing state of calm, clear mindful attention at Synergist. This does not usually form a part of developmental coaching, but it plays an important role in vertical transformative coaching. By healing shadow, we release the past and eliminate recurring reactive patterns and themes.



EVOLUTION IS A FORCE OF NATURE

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



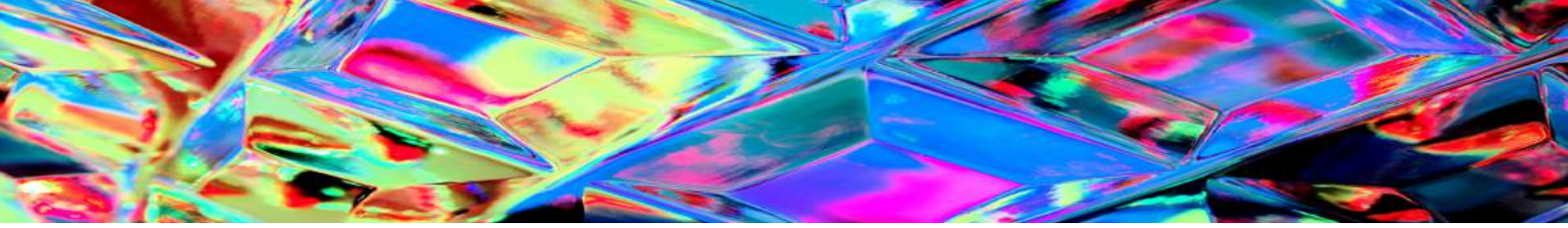
TRANSFORMATIVE COACHING EVOLUTION

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

- A focus on meaning-making in relation to the purpose of every life experience we encounter
- A dialogical partnership whereby the coach openly shares their insights, asks leading questions and invites the coachee to experiment with explicit perspectives, approaches and frameworks

This is a powerful form of coaching if your coach is at a later stage than your own evolution. They will be able to stretch your mind and open your heart to consider later stage perspectives and approaches that will elevate your leadership capacity and evolve your organisation.

COACHING TYPOLOGY	SKILLS-BASED COACHING	PERFORMANCE COACHING	DEVELOPMENTAL COACHING	TRANSFORMATIVE COACHING
Coach as ...	INSTRUCTOR	MOTIVATOR	FACILITATOR	COLLABORATOR
Coaching Paradigm	Informed, Practice makes Perfect!	Positive Psychology Process Centric	Humanistic Inquiry Person Centric	Holistic Emergence Systemic Synergy
Primary Success Factor	Ability to Teach & Learn	Clarity of Agreed Goals	The Coaching Relationship	Mutual Meaning-Making
Coaching Relationship	Transactional Transfer	Mutual Accountability	Professional Trust	Dialogic Partnership
Coaching Models & Techniques	Rehearsal & Feedback	Cognitive Behavioural	Narrative Story Ontological	Psychodynamics Complex Systems
Typical Duration of Session/Program	30-60 Mins 3-12 Weeks	30-60 Minutes 3-6 Months	60-90 Minutes 6-12 Months	90-120 Minutes 12-24 Months
Leadership Outcomes	Thought Leadership Best Practice	Transformational Agile Leadership	Authentic Adaptive Leadership	Quantum Eco-centric Leadership
Stage Outcome	SPECIALIST	ACHIEVIST	CATALYST	SYNERGIST



StageSHIFT PHILOSOPHY, PRACTICES & TIPS

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

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

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

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

Life is a MOVIE A Projection of the Conscious Mind *Live the Dream*
Life is a MIRROR A Reflection of the Subconscious Mind *Love the Drama*
Life is a-MAZING A Connection with the Cosmic Mind *Learn to Dance*
Life is a MYSTERY An Inception of the Universal Mind *Lead the Dharma*
Antoinette J Braks

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

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

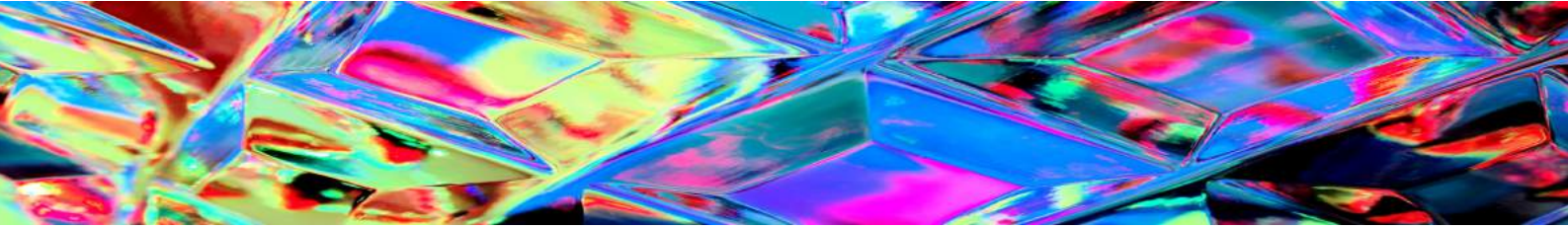
It is also useful to explore any personal triggers, criticism and judgments of others

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

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

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

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



SHIFT to SPECIALIST

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

SHIFT to ACHIEVIST

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

SHIFT to CATALYST

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

SHIFT to SYNERGIST

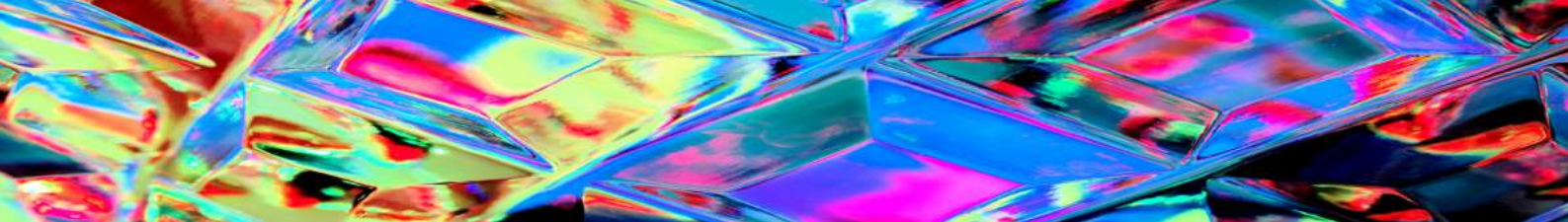
1. Live with integrity based on universal principles e.g., justice and freedom
2. Demonstrate high mutual standards when addressing and engaging others
3. Set, manage and navigate personal and shared boundaries scrupulously
4. Advocate on behalf of multiple diverse stakeholders to build shared momentum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

SHIFT to CONSTRUCTIVIST

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

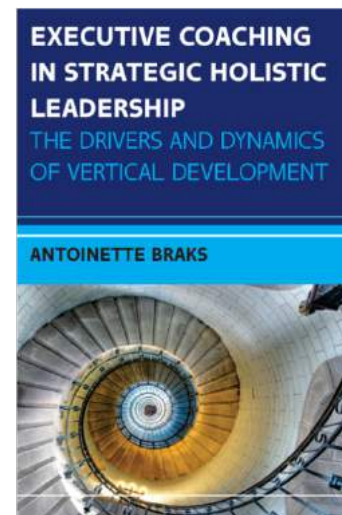
SHIFT to ALCHEMIST

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



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

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

Engage with your StageSHIFT coach or connect with Dr Antoinette Braks to find out how we can help you and your organisation to thrive and flourish through these disruptive times and more effectively contribute to the co-creation of a more sustainable, healthy, equitable and joyful world for all.

Warmest wishes and abundant blessings,

Dr. Antoinette J Braks PhD MBA.LBS

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*The higher our self-expression
and the deeper our self-awareness,
The richer our life experience and
the greater our soul evolution.
- Antoinette Braks*



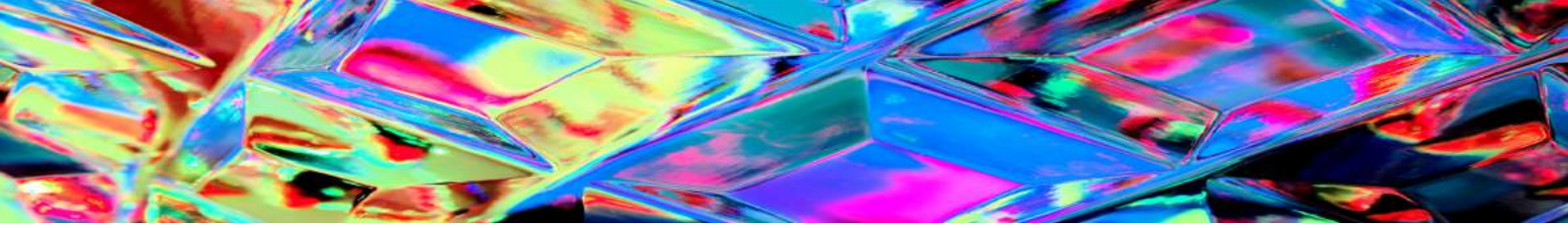
APPENDIX

Strengths and Shadows Through the Stages

Excerpts from Braks, Executive Coaching in Strategic Holistic Leadership. Ch 2

<i>Stage SHIFT</i>	<i>work</i>	<i>play</i>	<i>grow</i>	<i>flow</i>	<i>calm</i>	<i>care</i>	<i>free</i>	<i>love</i>	<i>joy</i>
									
Impulse	Ego	Will	Heart	Intuition	Mind	Guidance	Spirit	Light	Soul
OPPORTUNIST	CONFORMIST	SPECIALIST	ACHIEVIST	CATALYST	SYNERGIST	CONSTRUCT	ALCHEMIST	IRONIST	HOLIST
1 st	2 nd	Early 3 rd	Mature 3 rd	Early 4 th	Mature 4 th	Early 5 th	Mature 5 th	Early 6 th	Mature 6 th

Illustrations by Rudiestrummer@dreamstime



SPECIALIST @ play

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

Needs/Values

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

Strengths

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

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

Shadow

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

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

Executive Prototype

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



ACHIEVIST @ *grow*



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

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

Needs/Values

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

Strengths

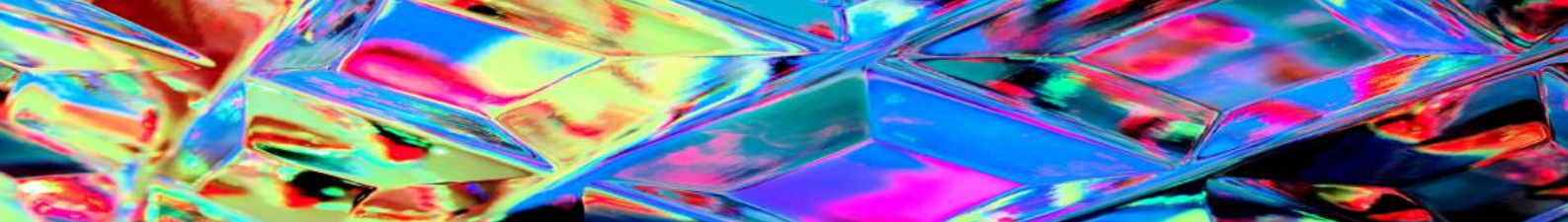
Achievists work incredibly hard to achieve their goals. Their developing ability to set goals, make plans, focus attention, juggle priorities, create strategies, implement initiatives, take risks, and monitor progress enables many *Achievists* to become high performers in their industry. The *Achievist*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

Shadow

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

Executive Prototype

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



CATALYST in *flow*

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



Needs/Values

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

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

Strengths

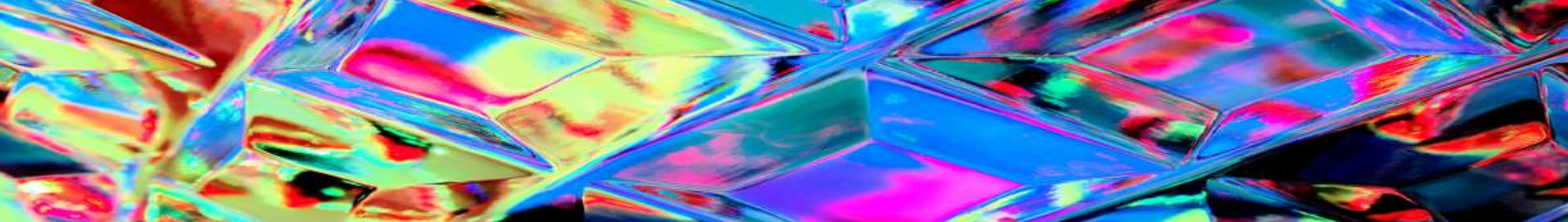
Awareness is a key word for the *Catalyst*, as is respect: both self-respect and respect for others. This is a key shift from implementing the transactional means to achieve specific ends to ensuring that the means employed are mutually respectful and appreciative of others, regardless of their capabilities.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

Shadow

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

Executive Prototype

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



SYNERGIST @ *calm*

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

Needs/Values

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

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



Strengths

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

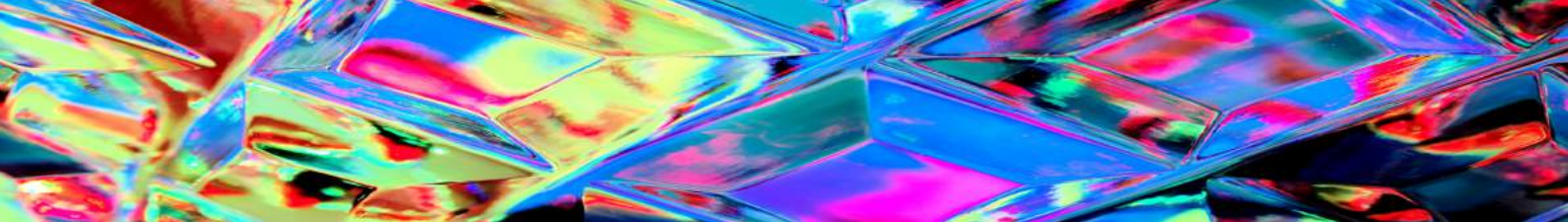
Shadow

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

Executive Prototype

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

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



CONSTRUCTIVIST @ *care*

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

Needs/Values

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

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

Strengths

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

Shadow

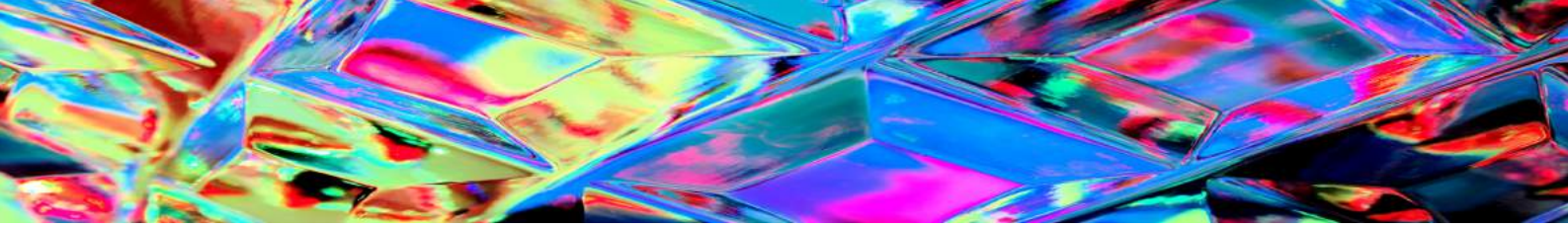
This transition takes a deeper dive into emotions that have hitherto not been experienced in the same way. People are known to experience the dark night of the soul, a time of desolation, as their appreciation of century-old patterns of world evolution and regression can be seen and begin to be understood.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

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

Executive Prototype

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





ALCHEMIST is free

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

Needs/Values

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

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

Strengths

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



Shadow

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

Executive Prototype

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



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