

# INTEGRAL LEADERSHIP COLLABORATIVE

## Interview Notes: Beena Sharma



## Beena Sharma Interview Notes

*Beena has been doing organizational development for twenty years. She specializes in ego development and polarity management, and works internationally on the front lines of integrally informed leader and organizational development. Tell us about the work you're doing.*

- Deepening individual and organizational development using integrating methodologies. Building on my related work with Holacracy, polarities and ego-development, background in large-scale change. Looking at how best to integrate these systemic practices, use an integral lens, do work that's more satisfying and that the client feels helps them.*

*How would you describe the difference between what you did a decade ago before you "got integral," and now when everything you do is integrally informed?*

- What's different is the implicit and explicit frames. Whatever we do, we're always using frames. The frames I used earlier were limited to the practices and methodologies I'd learned, and the frames I had to interpret my own learning, through my experiences with my clients. What's different now is that both those*

*frames are more expanded. I have many more perspectives and lenses through which to look at, i.e. what I'm going to offer the client, the client's context, and how I observe and interpret my making meaning out of the experiences of my clients.*

- *On one hand, that's a big difference. On the other hand, there's not a big difference, from the standpoint that what I was attempting earlier was to be more integrally informed, though I hadn't defined it in ways that the theory defines it. My intent was integral, but I was lacking a more descriptive, informed framework.*
- *The more I coach using the ego-development framework, the more I understand the theory, the more I'm realizing it's impacting my own development... how my understanding of integral has supported my evolution. So a small shift in me makes a big shift in the work I do with my clients.*

*How do you talk with clients about integral, and how do they experience that?*

- *Depending on the context, I can be anywhere from completely implicit and almost invisibly using integral, to where I'm actually teaching it, helping the internal group*

*that is co-designing with me understand the framework so they can take it into other areas of their work.*

- *Re: ego-development, it's better to be more implicit than explicit, because all the assumptions and flags that it raises. I typically work with a context. If I'm seeing something they're obviously missing, and the four quadrants seem to be a great way of including what's missing, then I use the four quadrants. Or introduce the concept of "maturity," if they're talking about taking leadership to the next level, for example.*
- *If they're feeling pain in an area because of privileging one pole of a polarity over the other pole, then I might bring up the concept of the polarity suggesting that if they "integrate" those two poles, they can be more "integral," thus leading into the larger integral model.*
- *I think they can tell the difference because in working with consultants in other specific areas, I think they feel I give them a broader view than others do.*
- *Because I integrate integral, ego-development, polarity, Holacracy, in various ways, if we're moving in a certain direction and something surfaces that clearly could use a different lens, I'm able to bring that lens appropriately; thus they feel they're getting a*

*comprehensive and more integrated approach. It also helps them integrate these terminologies, theories, and practices in their own mind. They're able to see their context from different angles that these multiple methodologies provide.*

- *In reflecting right now, I realize that I go through several levels of integration when I'm working with a client. The first level is: where I am today - meeting a new client and integrating my past experiences, the way I've used integral, what has or hasn't been achieved, what I've learned about myself through the process.*
- *The second integration happens in the discovery process with the client. What I do to understand their context - assessments, interviews, etc. That integration occurs as I'm listening to what's happening and what's needed.*
- *A third level of integration begins to happen as you co-design the solution with the client... adapting and integrating as new information arises.*
- *A fourth level happens when we deliver - making adjustments to new situations or perspectives that we weren't aware of.*

- *There's a fifth level of integration that happens after the delivery - reflecting on what I'd do differently to avoid something unintended we're experiencing now.*
- *As a result of the fifth level of integration that I did with one client, I carry that with me into the next client's first level of integration.*
- *Another thing I notice I do differently than before is that I now find it dissatisfying to just do a training program... I've found the training context to be too limited. There is some notion in the training paradigm that now that you've gone through training, you're trained. So it's not seen as a learning process over time.*

*The seminar model vs. the ongoing practice-based model...*

- *Yes. Which doesn't mean seminars are not useful. It's a great experience and people learn a lot. But you can lose so much of what you learn in a seminar if you don't follow up with ongoing learning and practice. This makes the seminar model not cost-effective to me.*

*So tell us about some of your client work.*

- *I've done several projects with a major company in Brazil who are very integrally-informed. One project*

*redesigned a direct marketing network from a single-level to a developmentally-based multi-level sales structure that isn't just based on financial performance, as other multi-level structures are. We've added two more high-level components to moving up the structure: learning/self-development/transformation rules, and social contribution rules. It's truly an integral base.*

- Used Suzanne Cook-Greuter, Robert Kegan, Sean Hargens as advisors. We married the Lovinger/Cook-Greuter levels with the Kegan levels of consciousness, and came up with four tiers in the sales structure, spanning eight levels of positions in the organization.*
- We use a model that includes both "growing up" and "waking up" approaches. The waking up approaches span all the levels, and the growing up approaches are targeted at each level, based on our understanding of stage theory. But very much keeping the organizational context and business needs in mind.*
- We're using stage theory as a heuristic to tailor the program, but not in a rigid way (no testing). Stage theory tells us at earlier stages have different learning modalities than later stages, so we use that to inform our design.*

- *We help the client learn through the process, begin to apply themselves as individuals, and most importantly, learn to hold the developmental model with perspective - avoid labeling people, or dissing people at earlier stages or levels in the structure. A lot of work went into orienting the client to see how to best hold the model in a way that would be useful and get them the business results they're looking for.*

*Can you say more about "growing up" and "waking up"?*

- *Introduced implicitly through the design of the experiences we offer to the employees and associates. Only the designers understand those terms.*
- *State theory of psychological development says that all human beings evolve from earlier to later stages of maturity. We are all interacting with people who seem to be more or less mature than ourselves.*
- *These stages have been defined based on one specific ego-development theory that uses language as the approach to measuring that development. You could use many other lenses to look at development.*

- *"Growing up" means maturing through these different stages. Everybody goes through the stages; you can't "skip" a stage. It is hierarchical and developmental.*
- *States, on the other hand, can be seen as experiences that can lead beyond our sense of ourselves. You can have state experiences at any stage of psychological development. Both are important aspects of expanding our consciousness, but they are different.*
- *That elegant framing gives us direction on how to design experiences to support people's development. Doing one or the other is not enough. It's the greatest polarity I can think of, growing up, and waking up, to support transformation.*
- *Another polarity is that transformation is not mandatory. Being exactly where you are, and the perfection of that, is another great polarity.*
- *Growing up is about more mature ways of being. It involves developing one's sense of self and reality to embrace broader and deeper understandings of oneself and the world. Horizontal growing up is about learning more skills and techniques and tools; but how you see the world, the stage you're at, remains the same. Vertical development is not about adding new tools and*

*skills, but about fundamental changes in the way you see the world and yourself... transcend and include a new way of being.*

- *Some examples of the growing up experiences would be: feedback processes, whether it's self-assessment, 360° assessment, peer feedback, one-on-one feedback; building new soft skills, heart skills; teamwork and collaborative tools; self-management; action-learning.*
- *Waking up are those experiences that expand the consciousness. The intention is to raise the state, to energize and open new ways of feeling and being. Both growing up and waking up experiences can help you shift to a new stage of development.*
- *The way we position waking up to the client is free of any spiritual or religious connotations. We have various categories:*
  - *Mind-body practices borrow from the wisdom traditions, psycho-therapeutic work, etc.*
  - *Affirmations, poetry, etc. to transcend one's limited way of thinking and being.*
  - *Inspiration - there are lots of stories of real people doing inspiring things that take us beyond ourselves.*

*The key to waking up experiences is how sustained are they, because they can be temporary. Churchill once said, "Men occasionally stumble over the truth, but most of them pick themselves up and hurry off as if nothing ever happened."*

- *Aesthetic experiences - artistic works and expressions, learning new ways to physically embody beauty. Finding the wellsprings of creativity in oneself, no matter what stage you're at, can be waking up.*
- *Psychodynamic work such as voice dialogue, Big Mind.*
- *We hope these opportunities of growing up and waking up will, over time, raise the whole system, while being very clear that this is just one dimension of each associate's life. Whether they actually know or not is dependent on a hundred other things: their life circumstance, what they want out of life, what stage they're at, what they're goals are, etc. So we're not claiming we're going to transform this whole community at the different stages. We're offering a developmentally rich environment, and creating more chances for learning accidents to happen.*

*What would it look like on the ground with these sales people, for those folks that are at earlier stages of psychological maturity, vs. those at later stages? A lot of our colleagues have been working in the area of task complexity... how complex is the task itself? Can you speak to this?*

- We see task complexity, or just cognitive ability to handle more cognitive complexity, as a core dimension of meaning-making, almost a pre-requisite in some ways. Ken talks about the cognitive line being the meaning line. But we focus on at least eleven dimensions.*
- To say a person is at a particular stage is misleading, because a person is always a spectrum, at different levels on the different dimensions. So there are many caveats around that.*
- I've wanted to work more on task complexity. My client is working with profiling work levels, and finding that some people show high work levels, but not so high ego-development, and vice-versa.*
- At an earlier stage, a salesperson is expected just to focus on getting their material reward - to sell the product and get rewarded for that. At the next stage, they're expected to understand more about the company,*

*as a context. This would be the Conformist/Blue/Diplomat stage, where the expectation is that they understand what are the norms, culture, rules, and maintaining standards.*

- At the next stage, in between Blue and Orange (which is not defined in Spiral Dynamics, but is defined in other ego-development frameworks) is the Expert. Gaining proficiency and mastery of their work, bringing more of a scientific orientation. Becoming an expert on a certain product, and understand how that compares to the competitor's product; what are the skills of business; continuous improvement of the quality of one's work.*
- At the next stage, the Self-authoring stage, it's about leading other team members, learning about collaboration. It's hard for the previous stage to really collaborate. This stage is about sharing information that supports the whole system, continuous learning, mastering individual and group communication, leading other leaders.*
- At the next stage, Post-conventional, it's providing inspiration, being a catalyst, creating the desire for people to invest in sustainable change, energizing the system.*

- *For each of these we talk about what kind of leadership would be required to support that stage, i.e. earlier stages are looking for more directive leadership, while later stages are looking for more autonomy. These aren't hard and fast, so we really want leaders to be able to offer both, but to also understand primarily where their stance should be.*
- *We describe the leadership stance and key organizational messages at each stage, like mottos that would anchor each stage. Because they've just begun, we're laying the road as we walk on it.*

## **Beena Sharma**

Beena Sharma brings significant international experience in facilitating leadership and organizational development training. She co-designs, implements and anchors large scale organizational change efforts, and is currently the head of Development and Training at Magellan, a major health organization. She contributes her expertise as a insightful facilitator and her mastery in polarity management to the LMF-intensives. Workshop participants admire her boundless energy, clarity, and deep, caring attention.



## Brett Thomas

Brett Thomas is the co-founder of Stagen, a Texas-based organizational consulting firm that specializes in Integral Leadership. He is the author and architect of the Stagen Leadership Academy's 52-week intensive *Integral Leadership Program* (now in its 10th year). Brett is a 20-year veteran in the field of human performance and organizational development having designed and facilitated hundreds of workshops and corporate training programs. Brett has logged over 10,000 hours coaching CEOs. He has published hundreds of pages of applied integral theory and has co-designed and co-delivered numerous international conferences and seminars on applied integral theory. Brett served many years as the Managing Director of the Integral Institute *Business and Leadership Center* and on the Editorial Board for the *Journal of Integral Theory and Practice*. Brett currently serves on the boards of both *Integral Leadership Review* and *Integral Publishers*. He is writing a book with Russ Volckmann on the subject of Integral Leadership.

