



The Story of Jill – How an Individual Leader Developed into a “Level 5” Leader

Maureen Metcalf & Dena Paluck

We continue to see Jim Collins book Good to Great at the top of the business best seller list. This book talks about the importance of “Level 5 Leadership” in organizational transformation from good to great. Collins talks about this as a concept but the overall topic of the book is how to move a company forward, not how to become a Level 5 Leader.

The purpose of this paper is to build on previously published work to address the developmental journey by telling the story of a composite leader as she develops through the developmental levels. We created this story to answer questions we have heard from many clients about what this development could look like. This story is but one path of one individual leader. While everyone’s life choices will differ, each will have some common qualities as well. We created this story to help coaches and leaders see a potential path through the developmental levels.

We believe that story has a role in helping readers see the path of development and illuminate some trends and challenges that are common and maybe even predictable along the way. There may be some value in understanding these common themes as we face them to know that others are facing similar challenges and that they are important to the overall developmental process. What our culture may minimize such as deep introspection and search for meaning beyond material success may be critical to later stage development. We hope that Jill’s story gives some insight into these struggles and the benefit they provide to Jill’s overall development.

What Are Developmental Levels?

The term developmental level can be described in several ways; one way is that leaders with higher developmental level have a different mindset or way of making sense of what happens around them. An example of how mindset can impact success is visible when we look at how people react to an opportunity. An individual may be given a high visibility project that could have a significant impact on the company and his/her personal success. One leader might see this as too risky and require very detailed direction to ensure the project is successful and the company and the leader are both protected from failure. The next leader may see this as a great opportunity to gather information as she goes, learn from the experience and make an impact on both the company and the community. A mindset that values opportunity and is comfortable with ambiguity differs significantly from one that is risk adverse and uncomfortable with uncertainty. It is helpful for us to see the differences and develop ourselves and others to the mindset that will promote success given our careers and goals.

Susann Cook-Greuter developed the Leadership Maturity Framework (LMF) to describe developmental levels as part of her PhD at Harvard University. This is the theory we recommend as it is supported by an assessment tool, the SCTi-MAP, which measures an individual’s developmental level. This is currently the most rigorously validated, reliable and advanced assessment tool to gauge adult leadership developmental levels. The tool is based on

the Washington University Sentence Completion Test (WUSCT) created by Jane Loevinger in 1978. Bill Torbert, Professor of Management at Boston College, revised the labels for the stages and added the concept of action logics.

While we refer to people as being at a developmental level or capacity, the test scores actually reflect the range of responses given by individuals. Most people's scores reflect a range of as many 6 or 7 developmental levels. Many people have a center of gravity with about 25% of their scores at the level below, referred to as the lagging edge; people are still refining their thoughts to bring them up into their primary level. Additionally, individuals generally have about 25% of their answers at the level above their center of gravity. That higher level reflects their growing edge.

For people using the SCTi-MAP as a tool in their development, the scores and specific feedback provide valuable information to help individuals become more aware of their growing and lagging edges. Growing edge represents the areas where one is developing toward a later developmental level while lagging edge represents the areas one is consolidating from earlier developmental levels.

While Collins provided some strong indicators of what Level 5 Leaders might look like, he did not use Cook-Greuter's work to fully define those leaders. We believe that his Level 5 Leaders correlate to the Strategist level as clarified by Cook-Greuter's theory. This hypothesis is based on our work with the SCTi-MAP over 9 years, our experience with leaders across multiple organizations over 20 years of consulting, and other research conducted by consultants using the same SCTi-MAP tool. This research is still limited. We continue to participate in direct research studies and also track results with clients. For additional information about this research, please see "Level 5 Leadership": Leadership that Transforms Organizations and Creates Sustainable Results published in March 2008 Integral Leadership Review.

Developmental Basics – What Are the Common Elements on the Journey?

One key element in development relates to the connection between development and life conditions. As students and practitioners, we believe that the environment is a significant factor in shaping an individual's behavior and can even impact the center of gravity from which an individual operates – the individual can regress to earlier levels or develop to later levels based on their environment.

We offer these basics as general guidelines for putting developmental theory into practice. The following points are also critical to a solid understanding of how development tends to work based on current research:

- All levels are necessary to make the organization successful. The goal is to help people develop – this may mean becoming more effective in their current level as not everyone will grow to the next level. Many people will become far more effective by focusing on enhancing their ability at their current level.

- We grow through developmental levels – there is no skipping a level – we must develop the skills and perspective each level has to offer. As with Maslow’s Hierarchy of Needs, basic needs at our current level must be met before moving to later levels.
- We transcend and include the prior level – this means we have access to what we learned at the current level and all prior levels. We may behave in a manner consistent with earlier levels at various times in our lives as influenced by life conditions. (For example, a person who tests at level 4 may act like a level 3 when in an environment filled with level 3 people.)
- Alignment is key – finding out which level a person is most comfortable and effective in along with where they fit within the organization is critical to the success of both the individual and the organization. Developmental level (capacity) is generally one important indicator of appropriate placement within the organization; hiring and promotional decisions should also consider other key selection criteria such as skill set and experience.
- For overall organizational success, it is important to create an organization that promotes the health and success of individuals at all developmental levels along with an environment where those that want to grow have appropriate support, challenge and encouragement.
- Developmental level is a description of the way each person is most likely to act in a situation or conflict. How a person *actually behaves* is influenced both by *thought processes, emotions, experience* and the surrounding *organization's structure and culture*.
- Those functioning at later developmental levels have access to more comprehensive thinking. They are able to take the perspective of a broader range of stakeholders and craft solutions that better meet multiple objectives.
- The organizational structure, culture and processes can create a “conveyor belt” to support development or it can create an environment that blocks development. Often the individual and organization will function at different levels. If the organization is functioning at a later level than the individual, the organizational environment will encourage individual growth. If the organization is functioning at an earlier level, the individual will experience barriers to growth. In cases where the individual and organization function at differing levels, an individual may benefit from coaching to help him/her function most effectively.
- People who score at later levels are often more motivated by their internal values and life purpose than external position and title. Consequently, many people who are testing at Level 5 are not as interested in leading large companies unless they have a passion about the organization and its’ purpose. This shift in focus as one develops makes retaining Level 5 Leaders even more difficult if the organization is not changing along with the leader. This is particularly poignant as organizations identify high potential leaders who

may be earlier in their careers and not yet in a position to significantly influence the organization.

The Story of Jill

Jill is the first child to a young couple. Her mother finished law school when Jill is still a baby and became an attorney at a local law firm while her father was a chef at a mid priced restaurant in town. Between the two of them, they make a nice living for Jill and her younger sister, Beth.

A normal child growing up in the Midwest, Jill progresses in typical fashion. Her parents encourage education and experience so she takes piano lessons and plays sports. She discovers her talent at athletics, particularly soccer, but is also a good student well liked by her teachers and fellow students.

Diplomat

Thinking style	Concrete operations
Focus	Concerned with social acceptance
Interpersonal style	Conform to the rules and norms of the desired group
Problem solving	Emerging problems often denied
Defenses	Imagine others think and feel the same as they do
Coaching style	Tell others what to do
Language signs	Short stereotype phrases, concrete descriptions and factual information



Around age 14 as she enters high school, Jill starts the Diplomat stage. She begins focusing on issues such as the different groups at school (nerds, athletes, musicians, etc.), what clothes people wear and what accessories are important.

Photo credit xldordashx

Jill begins identifying more closely with her peers, specifically the athletes. As such, she pushes her parents to buy her the “right” clothes, accessories and status symbols to match her peers. She begins joining her friends in the teasing of those who are lower ranked by status in the school, specifically the nerds. Jill focuses on ensuring that those around her and her group know their status and importance. She keeps her own behavior and language within the bounds created by her group.

Personal appearance becomes very important to Jill as she comes to believe that a significant part of her value is in her appearance. Having the right clothes, hair style, make up and

accessories are critical to her and occasionally create conflict with her parents who apparently fail to recognize their importance.

Jill loves to give advice to those around her about how to fit into their world. Her sister enjoys the help as she tries to navigate junior high school.

Anytime Jill “breaks” a rule, she feels disappointed in herself and as though she is letting down her friends. She is often concerned with what other people think about her and those thoughts generally dictate her own self image.

Expert

Thinking style	<ul style="list-style-type: none">Abstract operations, multiple views and permutations
Focus	<ul style="list-style-type: none">Expresses individuality in contrast to others: do they measure up to my standards?Can appear perfectionist and judgmental
Interpersonal style	<ul style="list-style-type: none">Constant comparison and measuring, perfectionistCan be critical and blame oriented
Problem solving	<ul style="list-style-type: none">Very adept at finding new and better solutions, better ideas, more perfect proceduresSees multiple possibilities and alternate solutionsMay have difficulty evaluating or prioritizing alternative solutions
Defenses	<ul style="list-style-type: none">Intellectualizes, rationalizes, and explains away what does not fit their expectations or beliefs, blame structure or tools for not working as they should
Coaching style	<ul style="list-style-type: none">As managers they ask many questions and accumulate factsShares their opinions freelyTends to be critical
Language signs	<ul style="list-style-type: none">Passive interest in cause (I wonder why?), beginning qualifications and conditions, beginning references to time (sometimes, often)



Jill starts moving into the Expert stage as she finishes high school and enters college at a state school in a neighboring city. She moves into a dorm with some friends from high school, although her roommate is someone she never met. Late night conversations with this roommate, an international student with a very different background from Jill's, push her to consider new ideas. While her old friends still hold considerable influence, Jill becomes more aware of her individuality apart from them.

Photo credit billogs

Jill learns intellectually and emotionally through her college experiences. She begins seeing the many options before her as she looks at different majors. Her conversations with her

roommate become more meaningful as she explores her new identity. She thinks more about her role in the world and what traits will help differentiate her from others.

As Jill evaluates her skills, she cements her belief that she is detail oriented and excellent at math. She falls in love with Accounting with its many defined rules and procedures. She quickly becomes a standout in the department as she studies excessively and rises to the top of the class.

Jill starts tutoring accounting to make a little extra money. She becomes well known for her expertise in the field as well as her obsessive questioning of those working with her. She is often found asking why someone took a particular action and defending her own answer. Her professors quickly learn that any deduction on one of her papers will result in an email interrogation and explanation about how Jill's response is correct, if not superior to the professor's.

As she finishes up her college experience, Jill's competence attract the attention of recruiters and she is offered several positions. Jill creates a Pros and Cons matrix to evaluate the opportunities but eventually turns to her parent's for help in making her decision. She takes their advice and accepts the job at the Big 4 accounting office in the state capital just a couple hours away from home.

Jill settles into her first professional job but does not make friends as easily as she did before. Her first manager seems to be irritated by Jill's incessant questioning and her initial annual review is not very good. Indeed, her first review is terrifying to Jill as she is told by those she respects that while her work is fine, she is too intimidating and alienating to those around her to be particularly effective. Her pleasant nature has been overtaken by her perfectionism and it is negatively impacting her life.

In response to the feedback, Jill starts to pull back a bit in meetings and watch how other people interact. She continues to receive good marks on her work and her reduced questioning appears to be well-received. As she evaluates what this means, she starts to transition to the next stage.

Achiever

Thinking style	<ul style="list-style-type: none">• Thinks in terms of formal operations, beginning appreciation of conceptual complexity as well as nature of closed systems
Focus	<ul style="list-style-type: none">• Reasons, causes, achievement, effectiveness, contracts and agreements
Interpersonal style	<ul style="list-style-type: none">• Has a sense of responsibility and obligation toward others even while they pursue their own agendas and ideas• Sees themselves as viable in the larger community, yet separate and responsible for their own choices• Conscious of the importance of communication and appreciates mutual expression of differences

Problem solving	<ul style="list-style-type: none"> • Concerned with consequences and priorities and plan their actions • Capable of revision and assessment as well as reorienting toward new goals • Scientific in orientation, wants to understand why and how and believe solutions
Defenses	<ul style="list-style-type: none"> • Intellectualizes, rationalizes, suppresses negatives and shadows • Concentrates on the positive and what can be done rather than dwell on the problems
Coaching style	<ul style="list-style-type: none"> • Tends to ask lots of questions • Increasing ability to listen to the experiences of others and play them back without adding their own interpretation
Language signs	<ul style="list-style-type: none"> • Expresses conceptual complexity and explicitly refer to causal relationships, consequences, and priorities • "I" statements are revealing, not cliché and often contain some element of contrast, self criticism, and ownership of responsibilities



Photo credit one-fat-man

At 25 years old, she is working at the Big 4 firm. Her altered behavior makes her more popular although she still doesn't really understand why. However, with her popularity comes more invitations to join her co-workers for dinner and drinks. As she spends more time with her colleagues, she starts to become aware that her style is not consistent with others.

She hires an image consultant to help her appear more professional as this will help advance her career. The restaurants and bars frequented by the group are often filled with designer clothes and adjacent to a parking lot of BMW's and Acura's.

Jill starts thinking about what she wants out of life and develops a 5 year plan. This plan includes her goals in several areas of life including: career, house and car, marriage and family, and savings.

For the first time since she was a little girl, Jill starts a Journal and writes about her life experience so far. She appreciates seeing the changes in herself. She starts reading biographies as a way to evaluate how other people's choices helped bring about the lives they enjoyed.

Jill decides that she would like to return to school to earn an MBA; she noticed that many of the senior executives in her company have advanced degrees. Returning to school and getting promoted are part of Jill's 5 year plan.

Once Jill returns to graduate school, it seems all of her time is spent working or studying. Her reviews improve as she starts managing her time to better accomplish her 5 year plan.

Her task list for each day gets a little longer until she is working 60 hours a week minimum; her boss notices this and Jill is promoted to the next level. The substantial pay increase allows Jill to buy a house for herself and her new Audi TT. She is excited about these purchases but has little time to appreciate them. Most of her energy continues to be dedicated to work and school.

Jill often attends training events to learn about the latest GAAP or FASB pronouncements. At one of these events, she meets Matthew, an accountant at another firm. As they talk, they find they both value responsibility, family and community. Their courtship is slow as they each work significant hours but they do find time to meet once a week. Jill is delighted as getting engaged was on her 5 year plan and Matthew may be just the right fit for her.

After a few years of dating, Matthew proposes. Jill happily accepts and they set a date for another year down the road. Jill's hours at work reduce just a bit as she plans the wedding but she is still effective enough to receive another promotion. At 31, she is making more money than she thought she could and is about to marry a wonderful man. Jill doesn't think that life could get much better.

The wedding goes off without a hitch and Jill sells her house to move into Matthew's place as it is quite a bit bigger than hers. They settle happily into married life with both of their careers going strong.

About 5 years go by and Jill is still quite happy with her marriage and career. However, the firm she dedicated her entire professional career and much of her life to is experiencing significant financial trouble. Indeed, they unexpectedly lay off her whole department. Suddenly, Jill becomes unemployed. She is in a state of shock and confusion immediately after the lay off.

Individualist

Cognitive style	<ul style="list-style-type: none">• Increasingly aware of systematic thinking and as managers contribute to this broader view• Increased appreciation for complexity, a growing appreciation for individual difference, and an ability to think in terms of how complexities and paradox can be integrated into larger whole• Takes into consideration non-linear influences
Focus	<ul style="list-style-type: none">• Interested in development as an innate human possibility• Consciously scrutinizes their beliefs in order to test their assumptions or to relish the novel mental freedom such a maneuver allows• Aware that the world is as they see it not as it is
Interpersonal style	<ul style="list-style-type: none">• Seeks to respect and understand others• Individual differences are respected and celebrated• Everyone has a voice and should be heard• When managing they can be autocratic or idiosyncratic in ways that they appear hard to nail down or aloof and unapproachable

Problem solving	<ul style="list-style-type: none"> Provides creative input to the workplace; provide novel ways of looking at problems Sees paradoxes rather than contradictions
Defenses	<ul style="list-style-type: none"> Self deception and culturally biased distortions
Coaching style	<ul style="list-style-type: none"> Truly appreciates others for their own uniqueness and different perspectives and can play coach or consulting roles in helping others become more fully themselves
Language signs	<ul style="list-style-type: none"> Expresses vivid personal information Rejects should's and clichés Moves from "or" or "but" to "and" thinking Explanations contain contingencies, qualifications and contrasting ideas



At 37, Jill is out-of-work and disoriented. She had spent 15 years with the firm that summarily cut her out. She spends the first few weeks after losing her job feeling a bit lost - she is at home all day with no immediate agenda other than figuring out what she wants to do next. This is a question she never imagined she would be asking herself. Matthew is working even more than his usual 60 hours to attempt to ensure he does not meet a similar fate.

Photo credit nessman

Jill is fortunate that her firm offered outplacement services. Her counselor helps her begin to explore what she wants in the next phase of her career. In addition to considering her career, Jill starts thinking about what this all means for her life. She picks up her Journal and writes down her thoughts about her motivations and choices. She starts thinking about the roles she has made for herself: daughter, employee, boss, wife, etc.

As the months go by, Jill withdraws from her social life and becomes more introspective, trying to make peace with what has suddenly happened. However, feeling a need to get up and move, she decides to start yoga. She recalls wanting to do yoga before but never finding the time. So, she steps in and connects with a new group of people.

The individuals in her yoga class are different from her other friends and she enjoys learning more about them and their perspectives. Jill talks quite a bit with another man in the class. This other man, Paul, is also a business professional so they have similar backgrounds. However, Paul was laid off several years ago so Jill feels able to relate to him. Paul is back in the workforce, albeit at a different company, and is able to provide a sounding board to Jill as she evaluates her life.

Jill starts to deeply value the opinions of those around her, particularly when they differ from her

own. This seems new to her as she doesn't recall input and feedback being so critically important to her before. She is experiencing many things differently as she stretches her mind. She is less focused on her 5 year plan and more on what is happening in the moment. Jill starts meditating to help maintain a sense of calm and focus. She finds that meditation helps keep her mind from wandering and away from her ongoing questioning of what she did "wrong" to lose her job.

Continuing her relationship with Paul, Jill talks with him about the different parts of herself (or different roles she plays in life) – she sees how the different roles have taken over at various points in her life. Specifically, how she had weighted the logical, analytical side so heavily during her career that she lost the part of her that loved sports and reading books. She talked with Paul and wrote in her Journal about how to rediscover these different aspects of her personality in a meaningful way.

Jill reaches out to her family and spends a couple weeks with her parents asking questions about their beliefs and choices. She is amazed to hear their stories about her childhood; she learns things about herself (and her parents) that she hadn't realized before. For example, as a small girl, she loved to watch her dad cook and play in nature. Her family traveled around the country camping in National Parks. As a child, she developed a deep love and reverence for nature but had forgotten that as her focus shifted during her life. In an attempt to re-connect with the passions she had as a younger person, she helped her dad in the kitchen during her visit and was surprised how much she enjoyed slowing down and delving into the different ingredients. It was a sensory, tactical experience that she had devalued during her career when she was focused on all things logical and analytical. She decided to plant a garden in her yard to grow some of her own food. This got her outdoors and reconnecting with her love of nature.

During her time between jobs, Jill began taking time to enjoy the being outside. Initially she went to local parks to hike and journal. She began to remember the joy she felt when she was alone in nature. Over time she started going to a retreat center in the woods where she spent days with her journal and books. She was away from her computer and cell phone for the first time in over 15 years. She and her dog Yoda took long hikes often. Over a period of months, she began to feel more connected to what it seems she lost during the years of long hours of work and graduate school. She began to have a sense of peace in her life.

As she re-evaluates her perspectives, Jill finds herself becoming more environmentally conscious and begins thinking about and questioning long-term organizational sustainability. Living in the state capital, she had ample opportunity to join groups focused on sustainability. Her interest in sustainability expands and she begins volunteering her time at a nature preserve.

During this time period, Jill's relationship with Matthew became rocky as he was unable to relate to what Jill was going through. She spends time thinking about why she got married and what Matthew brought to her life. After much thought and frustrated discussion with Matthew about what she was doing with her life, they sought counseling to work out their differences. While they had drifted apart, they were dedicated to each other and recommitted to one another during this process. Both Jill and Matthew agreed to make changes in their relationship including discovering common activities and making time for one another. During the rekindling of their relationship, Jill began to feel the support she needed to explore options other than returning to accounting.

Jill began looking at new career opportunities. She wanted to find work where she could feel satisfied and make a difference in the world. Also, she wanted to work for an organization that was socially responsible. Her activities exploring different worlds were wonderfully satisfying to her (yoga, environmentalism, etc.) but none of them would provide the paycheck she needed to survive.

Jill began exploring what she needed to live. She considered downsizing her house if Matthew would support this choice. She did not want to return to a job that would require her to work so much. She wanted more balance. Her growing awareness of the world around her changed the meaning of all the fancy things and they became just that – things. She felt weighed down by all she had accumulated and wanted to just get rid of it.

Jill's trip to her parents stayed with her and she developed an enduring and unexpected interest in food and nature. She began trying out recipes and exploring cooking the foods she grew in her garden. She also augmented her diet with food from a local farmer's market. She started buying organic food and cooking healthy meals. She would often invite her new friends over to taste her food. She felt a sense of joy in having another way to connect with friends beyond the fancy restaurants and trendy bars they hung out in during her years with the accounting firm.

As Jill explored her professional options, she began exploring different ways to combine her professional skills with her passion to make a difference in the world. She decided to take a job as the CFO with a national not-for-profit organization focused on developing green jobs in the US. This job allowed her to use her financial and leadership skills and also work for a group that addressed a social issue she was passionate about.

She was developing a focus on sustainability that considered how individuals and communities supported themselves in a way that would promote the health of her community and beyond.

Strategist

Cognitive style	<ul style="list-style-type: none">• Perceives systematic patterns and long term trends• Personal commitment and responsibility to create own meaning
Focus	<ul style="list-style-type: none">• Development, self actualization, self-fulfillment, authenticity and process• Lives their personal convictions according to internal standards
Interpersonal style	<ul style="list-style-type: none">• Tolerant, spontaneous, humble, accepting• Mutual interdependence with others is inevitable and experienced with awe and an awareness of one's responsibility toward them
Problem solving	<ul style="list-style-type: none">• Sees many sides of an argument or situation• Does not like to act for actions sake but rather would consider the system before solving a symptom• Recognizes the importance of ethical principles and mindful judgment for making valid decisions• Tends to choose what is ethical and just for many people in the long run rather than going for short term gain• Creative in conflict resolution

Defenses	<ul style="list-style-type: none"> • Suppression, altruism, humor, anticipation
Coaching style	<ul style="list-style-type: none"> • Helps grow others • Flexible about how tasks should be performed, trusts others to find their own solutions, offers help if needed • Appreciates and engages with complexities of individuals • Believes higher development should be fostered at any cost and very willing to support others • If others are unwilling to grow and become more, they become frustrated
Language signs	<ul style="list-style-type: none"> • Uses complex, flexible syntax, with a wide array of topics and concerns • Tries to present a coherent picture of themselves and their thinking; identity, growth, self fulfillment are favorite terms and topics



Photocredit Indy Dina & Mr. Wonderful's photostream cc

At age 42, Jill is now the CFO of a large national not-for-profit focused on the emerging issues related to promoting green jobs in the US. Jill and Matthew sold their large house and invested in a modest condo near a ravine that they retrofit with a gourmet kitchen so that friends can join them for meals cooked with fresh local food. Jill often works from home which fits her lifestyle that values balance. She works with others who have similar values who also appreciate the flexibility she provides them. Paul comes by often and is her mentor and friend.

Jill feels a meaningful commitment to her life as she dedicates herself to creating jobs for people that pay fair wages and have a positive impact on the community and the world. She has moved from working as a volunteer to be the Board Treasurer of the nearby nature preserve. She leads the nature preserve to expand their mission to include children's wilderness experiences and creating a community garden at the preserve. She believes that her volunteer time should have as much impact as possible and board work allows her to meet an organizational need that would be expensive to purchase.

When Jill thinks about her marriage, she is grateful that she and Matthew decided to work through their relationship challenges. She recognizes that while the counseling and personal changes were difficult, he has played a critical role in her life and she still loves him for his willingness to support her during her transition. She is excited to see Matthew make several changes in how he sees himself in the world as a result of their counseling such as his willingness to simplify their living arrangements and move to a much smaller home.

At this stage, Jill has learned to value her own thought processes and alone time enough that she deliberately spends one week twice a year at a cabin in a nearby state park with her Journal. Matthew has come to join her in this experience during which he hikes and reads. During this time, Jill evaluates what she is doing with her life and what needs to change as

there is always something. She thinks about her different strengths and contemplates if she is overusing any, like she did when she was younger. She appreciates the many opportunities afforded to her as CFO to be logical, analytical, creative, strategic, and tactical.

Jill's perspective is moving to thinking about the global implications of issues. She finds that she is now considering how systems fit together and wanting to reach out to connect her not-for-profit organization to others in other countries to make the best use of global resources. She is now representing the US at the World Economic Forum. She is strengthening her network of connections and is eventually offered a role with a global organization that comes from an initiative emerging through the World Economic Forum. She moves from CFO to the Executive Director of her organization. Her ability to think in a 25 year time horizon as well as her cultural sensitivity makes her quite effective in this new role. She begins working closely with the Gates Foundation and other prestigious groups and finds that her organization is making a significant impact in areas that are of paramount importance to global peace and sustainability.

Jill continues to meditate, run, eat healthy, and do yoga. She has found that taking care of her body, mind and spirit allow her to function effectively in very stressful situations. The meditation has worked to strengthen her focus so she is not pulled off track nearly as much by challenges that come up on a daily basis. Additionally, exercising helps her burn off the frustration of the day and feel refreshed and calm.

Alchemist

Cognitive style	<ul style="list-style-type: none">• They are complex personalities that see events on many levels
Interpersonal style	<ul style="list-style-type: none">• Can have a transforming ability to draw together opposites and initiate new directions from creative tension; tend to build their own novel organizations or work on their own doing what they perceive to be their best contribution to humanity; as leaders they will be seen as visionaries, either inspired or deluded
Focus	<ul style="list-style-type: none">• Seeks transformation of organizations not according to conventional goals but according to a higher order of behavior and being
Problem solving	<ul style="list-style-type: none">• They can often turn around a hopeless situation by the strength of their insight and personal courage; address contradictions and complexity whole heartedly
Defenses	<ul style="list-style-type: none">• Non-hostile humor
Coaching style	<ul style="list-style-type: none">• Likes to take on the role of catalyst or transformer but leave when they feel their role is done
Language signs	<ul style="list-style-type: none">• Complex, vivid, authentic, and playful; stream of consciousness quality or thought in process mode are attempts to let go of conscious structuring

At this point, Jill's commitments and life conditions do not require a transformation to the Alchemist stage of development. She is "fit" to her roles and will likely not continue to develop vertically unless new commitments or evolving life conditions create pressure on her to transform yet again.

Conclusion

While development is a choice, we hope that this story presented some value in illustrating how one individual can move through the stages. At each level, Jill's ability to manage complexity, assimilate and integrate multiple perspectives, use her emotions as a tool to increased effectiveness, and behave in a manner that was appropriate for the situation improved. As these qualities increase, so does her ability to implement transformational change.

As mentioned in the developmental basics section, the goal is to align developmental level with the job or role an individual performs. There is no right or wrong job – all are important to the success of the organization. Much of the value of this work is to help individuals see where they can be most effective and fulfilled and to help leaders see the path forward if they chose to invest in their development.

Because there are predictable levels, individuals can now follow a relatively predictable path to move to later levels of development if they wish. We hope that this type of story can illuminate that path a bit.

References

Jim Collins (2001). **Good to Great: Why some Companies Make the Leap ... and Others Don't.** New York, New York: HarperCollins Publishers, Inc.

Susanne Cook-Greuter (2002). "A Detailed Description of Nine Action Logics in the Leadership Development Framework Adapted from Leadership Development Theory," www.cook-greuter.com.

Maureen Metcalf. "Level 5 Leadership: Leadership that Transforms Organizations and Creates Sustainable Results." *Integral Leadership Review*. March 2008.

About the Authors

Maureen Metcalf, the CEO and Founder of The Innovative Leadership Institute, brings 25 years of business experience as an effective leader who demonstrates operational skills coupled with the ability to analyze, develop, and implement successful strategies for profitability, growth and sustainability. She has developed, tested, and implemented emerging models that dramatically improve how clients' businesses grow and thrive in changing times. She works with leaders to develop "Level 5" leadership competencies and with organizations to develop highly sustainable and effective organizations. In a time when businesses are rocked with ethical issues, global competition, automation, bankruptcies and accounting scandals, it is critical to explore these emerging solutions for long term organizational sustainability. Alignment between the individual and the organization is key to retaining the most talented leaders and producing and sustaining significant business results. Contact: mmetcalf@innovateleader.com.

Dena Paluck has worked as a highly talented consultant and lecturer. She has built a track record of success in leading mergers and acquisitions, due diligence, leadership assessment and coaching, process design and project management. She focuses on identifying and addressing barriers and opportunities required for organizational transformations. Dena excels in evaluating organizational systems including culture, leadership, and business processes. She combines analytical excellence and human performance acumen with her skills in change management and leadership development. Her industry expertise falls in: insurance, financial services, human services and the non-profit sector. She currently works for in Corporate Finance for a top insurance company.