

---

# *Control, Power and Strategy*

**Kathryn Alexander, MA**

*We can't solve our problems at the same level of consciousness that created them.*

Albert Einstein

## ***Workshop Description***

This presentation brings together a new tool to help assess the strategic developmental stage of the organization, called the *Birds of a Feather*<sup>™</sup>, with the ethics required in many of the new strategy directions, and leadership requirements. Together they form a solid kernel of understanding about people, upon which organizations can build a sustainable program for change.

In the last analysis it is people who make or break the success of any program. It is people who resist, and people who must change to improve performance, increase excellence and sustain quality. People are thinking human beings who have a variety of needs. These needs sometimes get in the way of learning and prevent change from happening. Not meeting these needs can generate resistance and sabotage potentially effective programs. This presentation will explore the relationship between resistance, excellence and an individual's thinking and knowing capabilities.

The *Transformational Learning and Performance Matrix*<sup>™</sup> provides a framework for learning that ties directly into performance needs. The seven levels of *knowing*: data, information, knowledge, managing, integration, wisdom, and union form a nested hierarchy of logical levels, each level requiring the integration of the previous level and a higher order of mental processing, as well. This expanding complexity pertains to the task orientation too. The task sequencing moves from data gathering, to procedural, through functional, managing, integrating, renewing, and union - connecting to the next larger system. The model is not linear, so each level is enmeshed in each of the others.

The *Birds of a Feather*<sup>™</sup> offers a window through which to view the underlying needs of the organization's culture. The five basic needs that people focus on start with the need for basic security, safety, food/lodging etc. Once those are established then the focus becomes "the rules of the game" i.e. what kind of behavior is accepted and approved. The third focus is personal power, "How can I make my mark here?" The fourth involves relationships as a learning focus, so diversity is valued and explored. The fifth is personal discovery or Maslow's self-actualization, here the individual is secure enough to begin to deeply explore their own potential. Organizationally each level has its own management style and contribution. What works at one level, just gets in the way at another. The current shift in management skills is forcing a move from a corporate culture based on rules and personal power to a culture based upon relationships and self-expression. To do this effectively management must begin to strategize the transition, as

well as vision the result. Together these two speak to the kinds of communication and strategies necessary to move organizations from one level of performance into another.

This workshop introduces *Holistic Knowing*©, an innovative development program, the third tool in this strategic approach to managing transition. *Holistic Knowing*© is a course or training designed to facilitate leaders and managers in their ability to:

- ☒ Make more effective decisions
- ☒ Work more potently with others
- ☒ Achieve a better understanding of difficult situations
- ☒ Have more confidence in themselves and their own abilities

*Holistic Knowing*© brings together the *psychology*, *systems* and *theory of knowledge* aspects of Dr. W. Edwards Deming's Profound Knowledge with the latest developments in cognitive theory and spirit/mind/body understanding to form a complete approach to knowing holistically.

Used in concert, these three tools provide a rich platform upon which to build sustainable change. The learning organization, coupled with a strong quality culture is able to achieve the flexibility and innovation that is so crucial to tomorrow's success. The development of this success will require much more attention to *psychology*, *systems*, and the *theory of knowledge* than companies have allocated, up to this point. This workshop hopes to begin to address this situation.

### *Goals and Objectives*

*During this workshop participants can expect to:*

- ☒ Experience a renewed appreciation for their own capabilities
- ☒ Gain insights into the gap between their current state and their desired state
- ☒ Learn what the various stages require in terms of control and how those needs affect their strategic intent
- ☒ Discover how the various stages of strategic development affect both their organizations' learning and performance capabilities
- ☒ Understand the connection between thinking capabilities and capacity
- ☒ Understand the relationship between expanded thinking capacity and sustaining effective performance
- ☒ Understand the connection between the new thinking capabilities, and the requirements of the various new strategic directions

- ☒ **Deepen their understanding of the effect of the organizations strategic developmental level on the successful implementation of strategy**
- ☒ **Develop a clear understanding of the costs of their new strategy in terms of time, money and effort**

### *Intended Audience*

This workshop will benefit leaders and managers looking to design and implement a new strategic direction in their company. People who have the responsibility for initiating or managing change in their organization.

### *A Business Perspective*

Fifteen or so years ago Quality appeared on the American scene. Americans were, by and large, confused between the “Quality Gurus”, unable to tell the difference between them. The inability to think critically and systemically has prevented many organizations, to this day, from understanding the significance of the difference, or from being able to learn the lessons that Deming spent so many years trying to teach.

Dr. W. Edwards Deming spent years trying to get leaders of all kinds to understand business issues from a different perspective. The whole point of *variation* and *understanding a system* was to get leaders and managers to think differently about their problems. Deming was right, but we need to go farther. His elegant framework, *Profound Knowledge* forms an incredible lens to help leaders manage differently. Both *system* and *variation* induce new ways of thinking. Systems thinking is a must in this age of rapidly changing scenarios, and *variation* brings a new source of information to the decision making process and that’s sorely need.

I have come to believe that the root of the current difficulty in creating sustainable change, is the inability of American managers and leaders to expand the use of their thinking and knowing capacities enough to cogently deal with the new kinds of challenges occurring today. American schools teach subjects, but they don’t teach thinking. Thinking is most often thought of as a mental activity, but there are several components of *knowing* that inform thinking that are *not* mental. It is for this reason that *Holistic Knowing*© is composed of six components, only one of which is mental.

They are:

- |                      |                          |
|----------------------|--------------------------|
| ☒ Mental Acuity      | ☒ Emotional Acuity       |
| ☒ Subtle Acuity      | ☒ Mind/Body Acuity       |
| ☒ Timing Sensitivity | ☒ Access to Group Wisdom |

Each of these relates to one or more of the levels of knowing found in the *Transformational Learning and Performance Matrix*™. The framework that the matrix provides allows for clear strategies in both learning and task orientation. Not everyone has the same affinity for each task. This difference in personal affinity is borne out by our personal experience and suggested by other tools, such as the *Myers Briggs Type Indicator*. While the fact of this difference is not new, the ability to clearly delineate tasks according to levels of *knowing* is.

The *Birds of a Feather*<sup>™</sup> looks at another aspect of being human. Built, in part upon the work of Abraham Maslow, the *Birds* is a framework of the evolution of ego development based on the successful fulfillment of five different basic human needs. Each need has its own requirements and its own demands. Each is its own “listening” as well. When a need is holding center stage, it becomes the first priority and the focus of attention. Thus, when it is not satisfied, little else has meaning or relevance. For organizations, this understanding has had significant impact on implementation strategies.

The following matrix shows the relationship between these two tools.

***Birds of a Feather*<sup>™</sup> & the *Transformational Learning and Performance Matrix*<sup>™</sup>**  
Showing areas of concern and the support needed for good performance

<b>Level of Learning</b>	<b>Level of Performance</b>	<b>Need for Security</b>	<b>Need for Rules</b>	<b>Need for Personal Power</b>	<b>Need for Relationships</b>	<b>Need for Self-Actualization</b>
<b>Data</b> (Habitual, Instinctual)	<b>Data</b> (Input)	Data that generates a potential threat or that creates safety or comfort - relieves anxiety for self	Data that defines the norm, data that defines authority	Data that points to who has power or authority	Nuances of emotion and reaction are important data	Openness to difference, variety and depth requires a rich data field
<b>Information</b> (Action without reflection)	<b>Procedural</b> (Procedures, conformance)	Information that ensures personal survival	Deep and detailed knowledge of rules and established procedures	Setting up networks and strategic relationships (old boy/girl networks)	Interested in psychology, sensitive to differences and aware of emotions in people	Delight in the unusual
<b>Knowledge</b> (Reflection)	<b>Functional</b> (Work flow, design, engineering)	Methods that provide protection or comfort	Clear boundaries, limits of the range of “divergent” behavior allowed	Skills to obtain power and control	Curiosity prompting the investigation of difference	Understanding connections and interdependence, receptive to possibilities
<b>Meaning</b> (Understanding context, relationships and trends)	<b>Managing</b> (Understanding what promotes or prevents effectiveness, alternatives, relationships)	Strategies for self protection, defense, and support	Doing what’s “right,” knows the “why”	Making things happen, looking for the “win”	Doing the “right” thing, seeing what serves others, drama, fighting for the under dog	Personal expression, growth, expansion. Risk as self-expression

<b>Philosophy</b> (Patterns, assumptions, beliefs, self-organizing systems)	<b>Integrating</b> (Systems thinking, long-term planning, multi-level strategy)	Acquires new knowledge only if it fits with past experience or presents a painful new reality	Will not go against the established rules, will “change” as ordered.	Pushing the boundaries, writing new rules, creating breakthroughs	Creating ways to reap the harvest of multiple outlooks and points of view. Creating new ways to get along	Ecology of systems, appreciation of aesthetics
<b>Wisdom</b> (Values and purpose)	<b>Renewing</b> (Expansion, connection to the larger system)	Security and pleasure allow expansion	Inclusion generates confidence	Obtaining wins leads to benevolence	A culture of trust that values diversity, generates curiosity and exploration	Renewal comes through interdependence and finding deeper meaning
<b>Union</b> (Direct experiential knowing)	<b>Unity</b> (Expansion, connection to the larger system)	Self, family, close intimate relationships	In group (people like me) and out group.	Movers and shakers, people in power	The human family	At one with the universe

Taken together these three tools offer a unified way of understanding and working with human diversity from a learning perspective that includes the whole human being.

### *About the Presenter*

**Kathryn Alexander, M.A.** is the founder of the *Art of Leadership - Impact!*. Kathryn’s customers include AT&T, Union Carbide, the U.S. Army Corps of Engineers, Mervyn’s, Rochester Telephone, and Pacific Telesis. She is also President of the Association of Innovative Managers and editor of its journal, *Taking AIM*. Kathryn is an adjunct faculty member specializing in Dr. Deming’s approach to Total Quality, systems and strategic planning for several Bay Area universities. She is the originator of the *Birds of a Feather™*, the executive development program called *Holistic Knowing©* and co-author of the *Quality Tools Matrix™*. She has three books on Amazon, “*What’s It Mean – Shifting To Green?*” on sustainability and the Sustainable Values Set™, “*Culture, Values and Unintended Consequences: A Workbook*” a useful tool to understand a company’s culture, and *Personal Values and Unintended Consequences: A Workbook*” to help families and family members better understand their family dynamics.

Contact her by email: [artofleadershipimpact@gmail.com](mailto:artofleadershipimpact@gmail.com),

Website: <http://ArtofLeadershipImpact.com>