The Presence Workbook

Version 1.0

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Contents

Introduction

Every profound change process, whether in an organizational or social setting, is the result of a journey that includes both tangible and intangible dimensions. Our activities and the outcomes or products of our journey exist for all to see. But our interior journey remains invisible to others, and often unrecognized even by us.

This workbook is a companion guide to three related books that seek to illuminate that journey: *Presence*, *Solving Tough Problems*, and *Theory U*.[1] Based on extensive research and years of personal experience, these books lay out a conceptual framework termed "the U theory" for thinking about deep collective change—change that is capable of bringing forth new realities more in line with our deepest aspirations.

Most learning and change processes fail to access and work with the underlying field of potential from which new possibilities emerge. The result is often disappointing outcomes and continuous struggle to sustain change efforts. Yet nature is continually creating and profound change in social systems sometimes does occur. As we have sought to understand our own experience of truly transformative changes, three aspects of the process have become clear: sensing, presencing, and realizing. *Sensing* involves learning to see freshly, transforming our perception of present reality and of our part in creating it. *Presencing* involves becoming open to what is seeking to emerge and discovering our genuine source of commitment. *Realizing* transforms our actions as we begin to act in the service of what is seeking to emerge.

We have identified seven specific capacities essential to continually sensing and actualizing emerging futures, individually and collectively, which are outlined in the figure of the U movement that follows. *Suspending* enables us to "see our seeing"; *redirecting* allows us to see from "within the whole," to see our part in creating what is; *letting go* and *letting come* create access to the larger field of possibility; *crystallizing intention* leads to new visions of what is possible; *prototyping* translates vision into living microcosms that embody the new; and *institutionalizing* embeds new ways of thinking and acting in self-sustaining forms. Each capacity is a gateway to the next. Nevertheless, only as all seven are developed does the entire U movement—sensing, presencing, and realizing—become possible. (See Figure 1.)

Ultimately, the usefulness of the U theory depends on our ability to translate it into practices that build these capacities over time. This workbook outlines some of the practices we have developed in our work with organizations and larger social systems, integrated in a full-U process that we refer to as a "Leadership and Innovation Laboratory" (Leadership Lab for short). These practices can be used separately and in

[1] *Presence: Human Purpose and the Field of the Future* by Peter Senge, Claus Otto Scharmer, Joseph Jaworski, and Betty Sue Flowers (Cambridge, Massachusetts: SoL, March 2004); *Tough Problems: An Open Way of Talking, Listening and Creating New Realties* by Adam Kahane (San Francisco, California: Berrett-Koehler, September 2004); and *Theory U: Leading from the Emerging Future* by Claus Otto Scharmer (forthcoming in 2005).

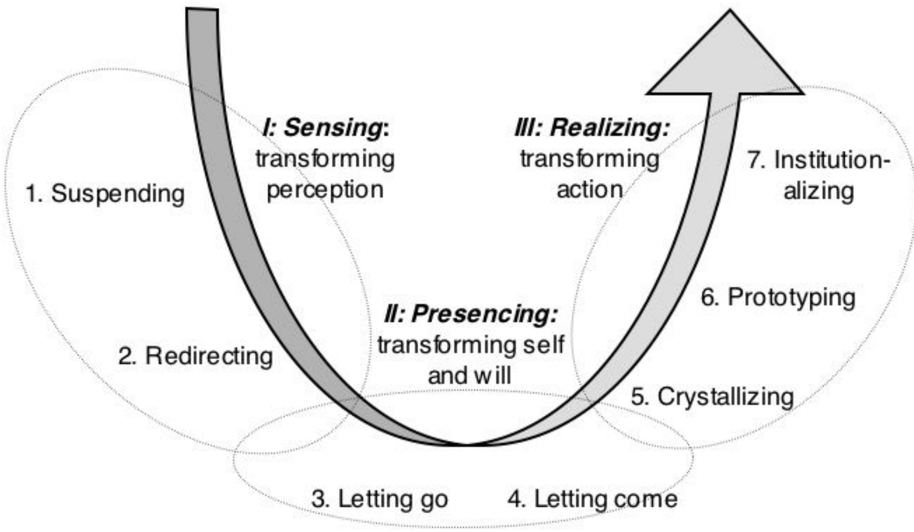

Figure 1 The U Movement: Three Spaces, Seven Capacities
Source: Senge, Scharmer, Jaworski and Flowers

other combinations, and many other practices can also be used to implement the U theory. This workbook represents the first compilation of a body of work we hope will grow as more managers, community organizers, teachers, and consultants incorporate the U methodology into their work. We are interested in getting feedback on your experiences with these methods, fostering larger dialogues within the community of readers and practitioners, and publishing updated editions of this workbook, all through the www.presence.net web site.

Who This Workbook Is For

We wrote this book for several audiences:

- **Practitioners:** managers, teachers and administrators, community organizers, and other professionals accountable for getting results and solving problems in specific social systems
- **Consultants:** those who serve as internal or external helpers to practitioners in specific settings
- **Anyone else who finds him- or herself engaged in complex situations and who is endeavoring to produce fundamental change:** those who act from diverse formal roles in trying to bring about change and learning in our families, businesses, schools, communities, and larger social systems

We believe that the U methodology and the practices included here can benefit a broad range of social systems. For example, we've applied them in diverse settings:

- Implementing a new emergency-care system that has dramatically improved quality and cost at a regional health-care system in Germany

- Developing new ventures at a global communications company, including a new line of business and an industry-changing alliance
- Improving children's nutrition in India through an effort that brings together the resources of a major multinational corporation with those of local companies, governments, and community organizations
- Creating new businesses within one of the world's leading energy companies, developing significant new sources of revenue and profit from previously overlooked activities
- Reforming the judicial system in Argentina, effecting fundamental changes from the Supreme Court on down
- Building a better future for the country of Guatemala through creating a strong coalition for change across previously embattled factions

But in order for the practices described in this book to yield such results—that is, to enable change participants to truly "shift the field" in which they are operating—those facilitating the process, be they practitioners or consultants, must possess a specific set of interior qualities:

- **An open mind, heart, and will**—the ability to suspend judgment while listening to others, to speak from the heart, and to listen from what is emerging. As many of those we interviewed expressed it, you must listen "from the source" and speak "from your authentic self" (your highest potential).
- **Personal experience with profound change**—experience with the kind of change that these practices enable, including a shift in the functioning of larger systems in which you were participating and realizing results that might have seemed impossible.
- **An "I/Thou" perspective**—the ability to enter the process with the assumption that your role is to serve 'the whole,' the health and vitality of the larger human and living systems, as they and and as they might be. You are able to serve the participants and the process; you feel reverence for both; and you are committed to remain fully present throughout.

Developing the interior qualities needed for facilitating the U process takes time and sustained commitment, and the ways to do so are as varied as the people who undertake the journey. But whatever approaches you use, it takes discipline to help activate the power of *intention*—your commitment to making yourself a vehicle for enacting a future that is not just a re-enactment of the past.

Such intention hinges on two questions: "Who is my Self?" and "What is my Work?" Some individuals achieve a degree of clarity about these questions early in life; others, after years of effort. For all of us, the process of answering these questions constitutes a lifelong journey. Daily, weekly, and even annual practices that enable you to become calm, observant, and focused can help you explore these questions. The opportunity to sit in deepening silence can be particularly powerful.

When you develop the interior qualities described above, you enhance your ability for sensing, presencing, and realizing the future as it emerges both individually and collectively.

How This Workbook Is Organized

Any practice in this workbook can be used as a starting point for guiding the U process. Though we have based the practices on our own experiences, we view them as a set of notes drafted by explorers in a dynamically evolving field. We fully expect that each reader will put his or her own "stamp" on the practices, depending on the nature of the challenge and the core group that forms to meet it.

Each practice begins with a short introduction placing the practice in the context of the U movement. "Purpose" and "Outcome" statements lay out the practice's intent and result. An "Illustrative Process" section describes recommended steps for carrying out the practice. "Tips" provide additional guidelines and insights for specific aspects of the practice. And an "Applicable Texts" section lists resources that will shed further light on the practice. Though you're welcome to apply the practices in the order they're shown in this book, you may find yourself circling back to revisit earlier practices—reflecting the iterative nature of the U process.

We hope you enjoy the journey.

PART 1: CONVENING A LEADERSHIP LAB

The two practices in Part 1 enable you to identify the individuals who will participate in your Leadership Lab, and to gather them around an emerging opportunity to effect profound change in your organization or larger social system. Participants in the Leadership Lab are identified through a series of generative interviews (Practice 1.1). These participants are then brought together and engaged in a foundation workshop (Practice 1.2).

Practice 1.1
CONDUCTING GENERATIVE INTERVIEWS

Many efforts to effect change in a system begin with conversations among people with a stake in that system. Yet such interactions often fail to penetrate to the depth necessary to release latent forces for change. Generative interviews are a set of in-depth, one-on-one conversations between you—the practitioner, consultant, or other kind of change agent—and key stakeholders. These conversations catalyze the Leadership Lab.

Purpose

To get the Leadership Lab process started by strengthening the connections of key stakeholders to the system (its current reality and its potential), to each other, and to the sources of their own commitments to effecting change.

Outcomes

Specific outcomes include clarification of the following:

- The "why"—the specific purpose of the Leadership Lab
- The "what"—challenges and concerns that must be addressed to release the full potential of the system
- The "who"—key individuals who will be selected to participate in the Leadership Lab
- The "how"—design of the initial steps in the Leadership Lab process

In addition, generative interviews raise the quality of thinking and relating in the system. These conversations are the first steps toward creating access to the field that will enable the change process.

Illustrative Process

The process of engaging in generative interviews is iterative. An initial set of interviews leads to a broader circle, until you have identified and spoken with a critical mass of key stakeholders, who together have the capacity to understand and influence the system. You and your fellow conveners will then invite some or all of these stakeholders to become members of the team and participate in the rest of the Leadership Lab process.

Below we offer guidelines for preparing for, conducting, and debriefing the dialogues. This is a sample menu that experienced professionals will customize by drawing on their own experience.

Laying the Groundwork for the Generative Interviews

1. **Identify initial participants.** Develop an initial list of potential interview participants consisting of the key individuals you believe are essential for moving the system

toward a better future. Include any individuals who will sponsor the project or whose support will be important. Also include individuals who don't hold formal positions of authority but who exercise leadership in informal ways, such as the ability to inspire others or generate a sense of shared urgency for change. Your first set of interviews will elicit suggestions for additional people to meet with.

2. **Find a partner.** Recruit a partner who will take notes during the interviews, so you can focus on the conversation and have a partner for reflection on the exchange. If you are skilled at taking notes and participating in a conversation simultaneously, a partner is not essential. In some cases, using a tape recorder may provide a more efficient and thorough form of transcription, although tape recording sometimes inhibits candor.

3. **Schedule dialogues.** Ask each interview participant to set aside at least two hours for the conversation at a time when they have the flexibility to go longer if desired. Conduct the conversation in the person's "home base" if this can be done without interruptions. If the person express surprises or concern about the amount of time involved, explain in practical terms why such an investment is necessary: that it will enable an in-depth understanding of their view of the system and the actions that may help move the system forward. Most interviews go beyond the scheduled time, as people become drawn into conversations in which they experience the rare opportunity to talk about their deepest purposes and concerns.

4. **Prepare a list of sample questions.** Although you will want to remain free to let the interview take whatever course naturally emerges, think through a list of questions that you believe will help you get at the issues at hand. Include questions that probe deep, systemic aspects of the system.

5. **Connect with your intention.** Immediately before an interview, take time to enter into a state of mind conducive to your purpose. Visualize yourself, for example, as an instrument whose purpose is to be of service, bringing forth from the interaction the latent possibilities for growth and change. Your goal is to become deeply centered, relaxed, and open to embracing whatever emerges during the dialogue. If you have prior knowledge of the person, consciously acknowledge and set aside any mindsets you have formed. Remind yourself that your goal is to see as clearly as possible into the world of the other person, unclouded by preconceived notions you have about him or her.

Conducting the Interviews

1. **Set the container.** Inquire into the person's understanding of the meeting and the larger process of which it is a part. It is important to be as transparent as possible about the purpose of the conversation, explaining how the data will be reported and how the process is likely to unfold. Do whatever you can to create a climate of safety. For example, assure the person that you will not attribute any quotations to him or her and will take care not to use examples that are identifiable.

2. **Invite personal history.** Begin by inviting the person to talk about his or her life story, starting with early childhood and the influences of family. This process of tracing life stories can help people reacquaint themselves with their sense of purpose. The focus on personal history may seem unusual, but this emphasis signals your aspiration to suspend the usual pattern of interaction and to go deeper. People rarely have the opportunity to explore the ways in which their personal beliefs and aspirations shape their view of their professional challenges.

   When you welcome people's personal stories, connections between personal dilemmas and core business issues are also more likely to reveal themselves. It is these connections that release energy and allow something new to be created. As the person recounts his or her story and gets closer to the present time or situation, the conversation will turn naturally toward systemic challenges. Of course, if you judge that an individual feels time pressured, it may make sense to start by focusing on present-day issues.

3. **Monitor your listening.** As the person begins telling his or her story, notice *how* you are listening. Are you judging the person through the lens of your own mental models and values? Observing as an outsider? Strive for *reflective* and *generative* conversation. See Figure 2 below for a graphic representation of these listening types.

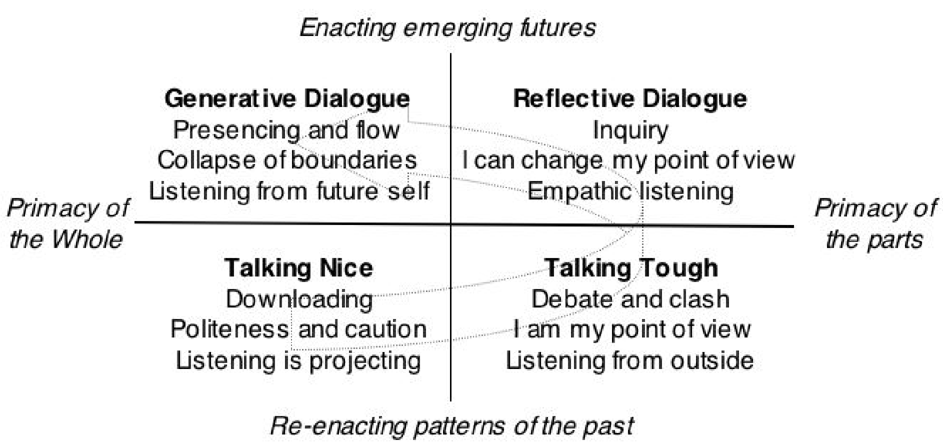

Figure 2 Four Field Structures of Conversation
Source: Scharmer

4. **Seek to understand deeper structures in the system.** A primary objective of generative interviews is to unearth the system's reality as it is constructed by its members—structures involving deep assumptions, mental models, and embedded patterns of interaction. When the conversation turns to the present situation, probe for these underlying patterns. Once you have established a rapport with a person, probe more deeply into their own thinking by asking what has hindered their capacity to address the concerns they are expressing, and how they are contributing to the

patterns they are concerned about. When people discover their part in creating and sustaining such disabilities, they often (re)discover their will to address the problems.

5. **Leave the door open.** Move the conversation toward closure by checking to see whether you have given the person an opportunity to fully express his or her concerns (e.g., "Is there any question you wish I had asked but didn't?"). Particularly at early stages in the process, invite suggestions for additional individuals to speak with. Finally, invite people to communicate any further thoughts, and ask permission to come back to them for clarification or insights on further questions.

6. **Reflect and debrief.** Immediately after the dialogue concludes, take time (with a partner, if you have one) to reflect on what you heard and saw during the conversation. Record your chief impressions. What was distinctive about this conversation? What substantive points were made? What is this person's source of commitment? Would this person be a valuable member of the Leadership Lab team?

7. **Bring the interview process to a close.** Continue broadening the circle of interviews until you feel sufficiently clear on the "why," what," "who," and "how" of the Lab. Interview 50 or so people, and identify 10-25 individuals from these interviews whom you think would be appropriate as Leadership Lab participants. The team should be made up of people who together constitute a "strategic microcosm" of the system in question, including informal as well as formal leaders.

Leveraging Dialogue Results

- **Present key findings.** Describe the key findings from the dialogues to the sponsors and Leadership Lab members. Illustrate each finding with one or more quotations from the dialogues that interviewees have permitted you to share (without attributing any quotations to specific individuals). Read these quotations slowly, in a clear, beautiful voice. Use silence to let quotations and insights sink into your listeners' minds.
- **Encourage small-group dialogue.** Invite people to talk together in small groups about how the key findings relate to their own experiences in the organization.
- **Facilitate large-group dialogue.** Engage the entire group in making sense of the key findings. Allow people time to engage in enough unstructured, open dialogue so that various perspectives rise to the surface.

Tips

Leave a substantial block of time after each interview so that it may continue if the person desires and so that you may record subtle impressions and recollections before they fade.

Applicable Texts

Jaworski, Joseph et al. “Setting the Field: Creating the Conditions for Profound Institutional Change.” May 6, 1998. Available at www.generonconsulting.com.

Jaworski, Joseph. “When Good People Do Terrible Things.” In Chapter 7 of *The Fifth Discipline Fieldbook* (Senge, Peter et al.). (Doubleday, 1994).

Scharmer, C. Otto. *Theory U: Leading from the Emerging Future*. (Forthcoming). See the section on dialogue interviews.

Practice 1.2
LEADING A FOUNDATION WORKSHOP

A Foundation Workshop is the kick-off event for a Leadership Lab.

Purpose

To bring the core team members of the Leadership Lab together for the first time, so they can clarify the Lab's origin, purpose, principles, process, core players, and intended results.

Outcomes

- A clear, shared understanding of the opportunity and task that the team has in front of it, including the deliverables that the team is expected to create by the end of the Leadership Lab
- A first sense of team building, of knowing each other, and of ground rules for how participants want to work together
- A basic understanding of the U theory and the Leadership Lab process that will structure the activities ahead
- Brainstorming and planning to prepare for learning journeys (see Practice 2.1)
- Training in conducting generative interviews for these learning journeys
- A clarification of roles and responsibilities within and around the team (which includes Leadership Lab team members, sponsors, and support staff and consultants)
- An initial timeline showing how the team can touch base (for example, weekly one-hour meetings or conference calls). This is particularly important during the first stage of organizing learning journeys, when extended core team members must be able to address issues and questions with all key players quickly and effectively.

Illustrative Process

The foundation workshop sets the tone and pattern for subsequent gatherings among the Leadership Lab participants. We hesitate to prescribe a rigid, step-by-step process for leading the workshop. Rather, we believe it's more important to know how to cultivate the right setting for such a gathering, set a hopeful tone, build a feeling of teamwork, and enable the Lab team to gather around a clarified strategic focus and learning agenda. To that end, we offer the following guidelines:

Selecting and Setting Up the Space

Select a meeting space that participants can use not only for the workshop but also for subsequent gatherings. Choose a space that is new or neutral for participants and that offers opportunities for people to retreat to private areas in subsequent workshops.

Ideally, the space should provide ample natural light from at least two sides, comfortable chairs that can be rearranged easily, and natural surroundings. Arrange the meeting space in ways that encourage maximum simplicity, concentration, and relaxation. Your objective is to create an environment that helps people shift out of their usual harried, reactive mindset into a more relaxed and creative one.

To that end, we recommend cultivating an informal, non-businesslike atmosphere in the meeting room—ideally, a blending between a creative loft studio and a relaxed living room. In most conference centers, this takes some ingenuity and persistence. We've found that the ideal space is a small, unpretentious hotel that the group can occupy completely, that's located several hours away from cities, and that's situated in an inspiring natural setting.

Sometimes, constraints on time and money do not allow for an extended offsite kick-off workshop. In these cases, you can hold a one-day workshop within or near the sponsoring organization, using available meeting facilities.

Building a Sense of Teamwork

At the workshop, it's vital to cultivate the sense that Leadership Lab participants' unique perspectives on the work ahead come together like the pieces of a mosaic to create a larger, unified picture of the work. There are several ways to create that sense.

For example, you can ask each participant to "check in" by describing his or her perspective on the work ahead and the context in which the person has become part of the effort. The check-in process is useful for evoking and stimulating each participant's context and sense of self.

Ensure that sponsors attend at least the first part of the workshop. These individuals provide crucial political and moral (along with economic) support, as well as lend credibility to the effort. Invite them to reaffirm for participants the purpose and objective of the gathering and launching of the Leadership Lab. Ask them to spell out why the success of the project is critical for the success of the sponsoring institution(s) and of the larger system. Have them clarify what they expect the team to deliver by the established date of the final presentation. Ask what would constitute success for the Lab effort, if results are delivered on the designated day.

Defining the Agenda

The Foundation Workshop's agenda comprises the following items:

- Develop a shared understanding of the Leadership Lab's purpose and objective.
- Build a shared understanding of the process.
- Grasp the current reality of the system in question—by talking with one another, with resource people, with Lab conveners and sponsors, and by processing results from any generative interviews that have been conducted.

- Invite guest speakers who represent an inspiring element of the future that the participants are trying to collectively create. For example, if the project team is setting out to achieve a particular kind of innovation, invite an innovator who once or twice in his or her career achieved something of similar scale or importance.
- Provide first training in the generative interview process.
- Provide first training in the capacity to observe precisely, including the capacity for suspending and redirecting.
- Develop the learning agenda (what participants need to learn more about) and make initial plans for the learning journeys (Practice 2.1).
- Establish the ground rules of working together and getting to know one another.
- Clarify roles and responsibilities.
- Establish next steps.

Applicable Texts

Jaworski, Joseph and C. Otto Scharmer. “Leadership in the Digital Economy: Sensing and Actualizing Emerging Futures.” May 2000. Available from www.ottoscharmer.com.

Käufer, Katrin, C. Otto Scharmer, and Ursula Versteegen. “Breathing Life into a Dying System.” In *Reflections*, Vol. 5, No. 3, pp. 1-10.

Scharmer, C. Otto. *Theory U: Leading from the Emerging Future.* (Forthcoming).

PART 2: SENSING

In the practices in Part 2, you'll find techniques for guiding Leadership Lab participants into the first "space" described in the U methodology: sensing. These techniques include learning journeys—visits designed to immerse participants in the various contexts relevant for understanding the current and emerging forces that shape the system at issue. Analysis of the learning journeys can include the construction of generative scenarios—stories about how the system might unfold in the future.

Practice 2.1
GOING ON LEARNING JOURNEYS

A learning journey is a trip organized around the Leadership Lab team's learning agenda, in which a small group of people dives into the experience of the system they are trying to understand and influence. A learning journey can last several hours, several days, or even longer if it includes visits to different subsystems. The participants study the system up close, and engage in dialogue with people who are part of the system or who have important perspectives on it.

Purpose

To enable participants to open up and deepen their appreciation and understanding of the system they are trying to influence

Outcomes

- A set of observations of and insights into the system, into the ways in which the system might develop in the future, and into how participants might influence the system's development. All of these insights can be used as inputs to generative scenarios (Practice 2.2).
- A sense of community among the journeyers
- A web of relationships with key players inside and around the system

Illustrative Process

Whether you're seeking to embark on learning journeys as part of your own learning agenda, or you're guiding a group through such journeys, the following steps can help you achieve this practice's purpose and outcomes:

1. **Consider your learning agenda.** Your group may have developed its learning agenda—what participants need to learn more about—during a foundation workshop or in some other way. In preparation for learning journeys, brainstorm persons, organizations, subsystems, and experiences you might visit. Ask others for their suggestions. For example:
   - Managers from one company that had set out to improve its capacity for innovation visited innovative organizations in other industries and sectors of society.
   - Members of a city government interested in economic development traveled to other cities to observe the kinds of challenges these communities had encountered, as well as learn about their strategies for addressing them.
   - Members of a civic organization seeking to improve the political process in their country traveled to a part of the nation that they had never personally seen before.

- Managers from a transport company that had received customer complaints spent time with frontline staff members—truck drivers, customer-service representatives—with whom they'd never interacted before.
- Executives from a food company who were concerned about waste visited one of the company's warehouses where huge quantities of food had spoiled.

2. **Organize the learning journeys.** Contact people who can host or guide your group on their visit. Find ways for your visits to be interesting and useful for both your group *and* your hosts. (These are real win-wins.) Be creative in designing learning journeys that enable your group to experience the system you are visiting first hand. Emphasize informal walking around and multiple encounters and dialogues (which you can achieve by having your group split up), rather than formal, one-way presentations. Ensure that visit logistics allow your group time to prepare for each visit and to debrief each visit thoroughly before the next one starts.

3. **Prepare your group to observe and listen with open minds and open hearts.** The key is for Learning Lab participants to listen not just to confirm what they already know but also to detect what is new and surprising. You also want participants to see what the system looks like through the eyes of others, and to perceive what is emerging (but perhaps not yet visible) in the system. Go into the visit with questions from your learning agenda in mind—but also listen for the unasked, the unexpected, and the synchronistic.

4. **Debrief each visit as soon as it is over, while it is still fresh.** Good debriefing questions include:
   - "What stood out for you about the person/system/experience we just encountered? What struck you most strongly?"
   - "What do you consider the essence of this person's/organization's/system's success? What images, stories, or metaphors capture that essence?"
   - "What did you notice about yourself and your own system? What potential new opportunities for yourself and your system occurred to you?"
   - "What are the most important insights you took away from the visit? What questions or puzzles arose in your mind during the visit?"

Tips

- In identifying potential learning journeys, consider people and situations that might be most interesting, challenging, and different. Don't stick with the familiar and comfortable.
- Unleash your creativity in planning learning journeys. Remember that these excursions can involve not only engaging in generative interviews but also visiting places and having experiences that can foster valuable new insights.
- Keep in mind that learning journeys differ from benchmarking tours. Whereas benchmarking tours are intended to enable participants to compare standards across organizations, learning journeys have the far broader and deeper purpose of enabling participants to see the entire system in question on a whole new level.

Applicable Texts

Gross, Philippe L. *The Tao of Photography: Seeing Beyond Seeing*. (Ten Speed Press, 2001), pp. 83-85.

Mirvis, Philip H., Karen Ayas, Karen, and George Roth. *To the Desert and Back: The Story of the Most Dramatic Business Transformation on Record*. (Jossey-Bass, 2003).

Jaworski, Joseph, and C. Otto Scharmer. "Leadership in the Digital Economy: Sensing and Actualizing Emerging Futures." Interview Project, May 2000. www.generonconsulting.com

Practice 2.2
CONSTRUCTING GENERATIVE SCENARIOS

Generative scenarios are a set of relevant, challenging, substantial, and clear stories about possible futures of the system that the Leadership Lab team is trying to understand and influence.

Purpose

To synthesize and clarify the team's understanding of possible futures of the system and of their relation to these futures

Outcomes

A set of two, three, or four useful scenarios—stories that are:

- Relevant: they deal with aspects of the system that the team and sponsors already know are important
- Challenging: they deal with aspects of the system that the team has discovered are important
- Substantial: they describe futures that the team thinks are logically consistent and plausible
- Clear: they can be readily understood by sponsors and other stakeholders in the system

An additional outcome is a set of key conclusions about how the team's actions (and ways of being) influence and are influenced by which scenarios unfold.

Illustrative Process

1. **Clarify the agenda.** Articulate the team's strategic agenda—the key dimensions of or questions about the system that the scenarios must address if they are to be relevant. This agenda can be elicited through a set of generative interviews or (quicker but less thorough) through a team dialogue.

2. **Assess certainty.** Assess what is certain and uncertain about the system's future. Consider but do not be limited by the strategic agenda. Learning journeys (Practice 2.1) are an excellent way to stretch your thinking about certainties and uncertainties.

3. **Brainstorm stories.** Brainstorm ten to twenty stories about possible futures for the system. The stories will all contain the certainties and will differ according to the uncertainties. (But keep in mind that through this conversation, you may change your view of what is certain and uncertain.)

4. **Consider relevancy and challenge.** Look for stories that are both relevant and challenging. Describe each story with a list of key themes, images, and phrases (not with a narrative). Give each story an evocative name.

5. **Choose scenarios.** From among brainstormed stories (or combinations thereof), choose two, three, or four that you think are the most useful for understanding possible futures and your relation to them. There is no recipe for choosing useful scenarios; the process requires judgment.

6. **Flesh out the scenarios.** Develop each of the chosen stories as a substantial, clear narrative describing how the system would unfold over time.

7. **Consider implications of the scenarios.** Use these scenarios to deepen your understanding of the opportunities and risks you face now and in the future. Consider what you must do and be to contribute to bringing forth a future that you want or that is trying to be born through you.

Tips

- In constructing scenarios (steps 1-6), focus on what *might* happen, not on what you *want* to happen. Consider which futures are substantial (logical and plausible), not which ones you like or dislike.
- Look for scenarios that are plausible, although not necessarily probable. Substantial scenarios are based on a deep systemic understanding of the system. The tools of systems thinking (as described in *The Fifth Discipline* and *The Fifth Discipline Fieldbook*) are useful here.

Applicable Texts

Kahane, Adam. *Solving Tough Problems.* Chapters: “The Miraculous Option,” “The Wound That Wants To Be Whole.” (Berrett-Koehler, 2004).

Schwartz, Peter. *The Art of the Long View.* (Currency, 1996).

Senge, Peter M. *The Fifth Discipline: The Art & Practice of the Learning Organization.* (Doubleday, 1990).

Senge, Peter M. et al. *The Fifth Discipline Fieldbook: Strategies & Tools for Building a Learning Organization*. (Doubleday/Currency, 1994).

Van der Heijden, Kees. *Scenarios: The Art of Strategic Conversation*. (John Wiley & Sons, 1996).

Van der Heijden, Kees. *The Sixth Sense: Accelerating Organizational Learning with Scenarios*. (John Wiley & Sons, 2002).

PART 3: PRESENCING

The activities in this part help you guide the Leadership Lab team into the second “space” described in the U methodology: presencing. These practices include telling personal stories (Practice 3.1), which help participants to go deeper, glimpse the larger whole, and connect to their source of shared purpose and commitment. The wilderness retreat (Practice 3.2) enables team members to clarify what they’re being called on to do, individually and collectively.

Practice 3.1
TELLING PERSONAL STORIES

This practice consists of an evening during which team members tell stories from their own lives.

Purpose

To deepen team members' understanding of and connection to:
- each other and themselves—where they are coming from
- the system that they are part of and that they are trying to understand and influence
- their source(s) of creativity and commitment—what is called for from them

Outcomes

A shared sense among team members, articulated or not, of their understanding of and connection to the above

Illustrative Process

1. **Prepare the space.** Prepare an intimate and relaxed space for sharing—for example, a circle of comfortable chairs in a quiet room or around a fire.

2. **Invite stories.** Invite team members to tell stories from their own lives (not something they read about or that happened to someone else) that they think might illuminate the system they are trying to understand and influence. Some possible framing questions:
   - "What is a story from your own life that explains your commitment to this work?"
   - "What is a story of a turning point in your life that brought you here?"
   - "What is a story from your own life that describes a time when you glimpsed your own highest potential? What did you see, and how did you feel about what you saw?"

3. **Encourage attentiveness.** Suggest that the team give each person an opportunity to tell one story before anyone tells a second. Have the person telling the story hold a "talking stick" or other object to signify that he or she has the floor and must be given the team's undivided attention. Allow silences between stories.

4. **Close the session.** When the time seems right (after an hour or so, and before the team's energy dissipates), suggest that the session end.

Tips

- The purpose of this session is to listen to each person's story and to the whole that is being manifested through them. It is not to react to or to analyze the stories. Leave any discussion of and reflection on the stories until a later session, perhaps the next morning, after the group has had a chance to “sleep on them.”

- As people share their stories, model attentiveness and open listening. Don’t let your attention wander. Resist any temptation to over manage the session.

Applicable Texts

Kahane, Adam. *Solving Tough Problems*. Chapters: “Cracking Through the Egg Shell,” “The Wound That Wants To Be Whole.” (Berrett-Koehler, 2004).

Jaworski, Joseph et al. “Setting the Field: Creating the Conditions for Profound Institutional Change.” May 6, 1998. Available at www.generonconsulting.com.

Practice 3.2
LEADING A WILDERNESS RETREAT

Through years of experimentation, we have concluded that the most powerful and reliable way for groups to collectively access primary knowing is the wilderness retreat. The retreat is a multi-day experience that includes a lengthy period of solitude (the Solo) for each participant in an inspiring, remote, natural setting.

The retreat unfolds along three tracks of experience:

- Participants synthesize key learnings gained through earlier learning journeys.
- They individually go into nature to gain access to deeper ways of resolving the challenge facing the group.
- Immediately thereafter, participants gather to collectively address the challenge directly and agree on three or four high-leverage solutions (see Practice 4.1).

This critical stage of the Leadership Lab process requires careful planning and execution. In this particular practice, the team members cross a major threshold—the gateway to operating from their deepest purpose in concert with the larger whole. In these circumstances, facilitators and guides must themselves have previously crossed that threshold in order to create the appropriate container and field for this work in the wilderness.

Purpose

To enable participants to uncover their deeper knowing about the system and what they are being called to do about it—individually and collectively

Outcomes

- A sense of renewal among participants and the highest level of energy and commitment to the work at hand
- Breakthrough solutions to the challenge confronting the team
- Agreement on teams who will develop proposed solutions through the prototype stage
- Plans by each prototype team for organizing and initiating its work

Illustrative Process

The wilderness retreat is specifically designed to help Leadership Lab participants create a unified learning field among them so that, acting as a “single intelligence,” they can create the breakthrough solution to the challenge they’re addressing. Participants are usually leaders in their chosen life work, so they typically operate under conditions of high responsibility, time pressure, and complexity. These conditions reinforce the sense of separation and alienation from ourselves, each other, and nature we have been socialized to accept. In this alienated state, it becomes increasingly difficult to access one’s highest form of creativity.

The activities in the retreat—particularly the Solo and what takes place immediately afterward—are designed to collapse these self-imposed boundaries of separation. Participants can then gain access individually and collectively to primary knowing.

For tens of thousands of years, human beings and nature were not separate—one was the context for the other. Ancient and indigenous peoples have long viewed the sun, moon, rocks, trees, animals, oceans, and birds as divine messengers of the Great Spirit. They believed that the Earth has a soul. Natural places served as sanctuaries for connecting to Source, to life itself, and for expressing one's highest form of creativity. "The collective unconscious," wrote Carl Jung "is identical with nature herself."

Among all the practices in this book, the wilderness retreat and Solo can prove the most challenging because of the subtlety of the Solo experience and the need to set the field for participants before they embark on the Solo.

Laying the Groundwork for the Wilderness Retreat

1. **Select a suitable site.** Selecting the location of a suitable site and planning for participants' comfort and safety are essential for this practice. If at all possible, hold the retreat in an area of great natural beauty, ideally remote from human development of any kind. Each Solo site must be out of sight and sound from the other. The quality of place is foundational in this work. An indigenous, sacred space is ideal, but remind participants to treat this place with the requisite care, reverence, and deep respect.

2. **Provide for logistics and certified guides.** Participants' safely and comfort are paramount. Attend carefully to the assembly of the requisite tents and equipment. Participants usually select clothing for the retreat themselves, but you should provide lists describing the specific clothing needed to accommodate the climate and conditions at the site. Use only staff members who are highly experienced, trained, and certified in wilderness events. And make sure that detailed plans are in place to accommodate any injuries or emergencies.

3. **Retain remarkable persons.** We recommend retaining for the retreat one or two individuals of extraordinary experience and perspective to help prepare the participants for the Solo.

4. **Provide instructions and pre-reading.** Give participants the requisite instructions to prepare them for the Retreat. Instructions will include an explanation of the required personal clothing and personal equipment, full explanation of the terrain and climate to be encountered, and reading about the history of the site. Instruction on Qigong and any other contemplative practices to be used should also be provided. An excellent reference on Qigong is Ken Cohen's *The Way of Qigong: The Art and Science of Chinese Energy Healing* (Ballantine, 1997).

Conducting the Retreat

1. **Conduct sunrise seminars.** The practices of Qigong and meditation can be foundational to the work at the bottom of the U. These disciplines are gateways to presence and, although they take a lifetime to master, beginning the work during the retreat is highly productive. Ask a member of the staff or a participant who is an advanced practitioner of these disciplines to conduct "sunrise seminars" for team members every morning for an hour or so.

   In teaching Qigong and meditation, we emphasize in the pre-reading and in the seminars that these exercises can help participants quiet themselves and align their energies. But most important, such exercises help people develop a high degree of coherence between the cognitive and creative sides of their brains. These disciplines also help people tap into the unified learning field set among themselves during the final stages of the retreat (see *Presence*, Chapter 11, pp. 165-166).

2. **Crystallize key learnings.** During the first one or two days of the wilderness retreat, participants synthesize the key insights they gained from the Learning Journeys, including possible ways to address the Leadership Lab's defining challenge. This synthesis can be accomplished through the building of generative scenarios or other processes. Ensure that the various learning journey teams not only share their findings but also describe what they experienced throughout the Learning Journeys. Methods such as the "World Café" can be particularly effective during this part of the process (see Practice 3.1.)

3. **Provide instructions for the Solo.** Hold a session to prepare the participants for the Solo. The instructions should include:
   - Specific guidance about finding the sites, including a diagram of the location of each site and detailed plans for traveling to and from the sites. If appropriate, let participants select their own sites.
   - Use of equipment (sleeping bags, camp lights) and provision for food and water (use of water purification devices)
   - Procedures for emergencies and location of guides at base camp
   - Instruction on performing indigenous ceremonies reflecting love and appreciation of nature for the gifts being received (see, for example, *Presence*, p. 58)
   - Instructions to leave behind all means of distraction, including watches, reading materials, cameras, radios, even writing journals ("the less you pack, the more that awaits you")
   - The provision to opt out of the Solo, and explanations of alternatives. These may include having the Solo near the base camp. Alternatively, participants could have the Solo in a nearby natural setting during the day and return to the base camp every evening.
   - A request that food be held to a minimum. Some participants may elect to fast. Explain and provide appropriate alternative preparations for keeping up electrolytes.

4. **Conduct a fireside dialogue.** The evening before the Solo, hold a fireside dialogue that is led by a remarkable person highly accomplished in his or her own field and with deep experience in Solo practice. We suggest holding this dialogue around a campfire outdoors if possible. If that's not possible, the group can gather around a fireplace inside. The intention is to build the container, set the field, and lower any anxieties over the Solo experience. This is an excellent opportunity for storytelling. In our experience, these dialogues often go very deep and last late into the evening.

5. **Provide instruction on the experience of silence.** It's vital that participants become comfortable with long periods of silence. Of all the challenges presented by the wilderness retreat, we find that remaining silent for two or three days can be the most difficult. We ask participants to refrain from talking or uttering a word from the time they depart the base camp for the Solo sites until they return. Consider providing readings reflecting observations by thought leaders on the power of silence.

6. **Conduct the Solo.** The participants depart on the Solo in silence. Just before their departure, the central injunction is given to the participants: "Give deepest appreciation to nature, and you will be amazed at what she will teach you." The participants remain in silence until they return to the circle for the campfire dialogue.

7. **Conduct a campfire dialogue.** This is the first collective activity after the completion of the Solo and should be undertaken immediately upon participants' return from their individual campsites. If possible, facilitate this dialogue in nature in a circle around a campfire near the Solo sites. Participants have had a profound experience, and care must be taken to maintain the container.

   The intention on the part of the facilitators and guides is to pay deepest attention to the unified learning field that underpins and integrates the team as a whole. The facilitator leading the dialogue should open with an appropriate reading, then simply ask the group to share the stories of their Solo experience. A talking stick or other object can be used, and the principles of true dialogue should be followed. At the conclusion of the dialogue, a meal should be provided. The participants then return to the base camp and prepare for the selection of the prototype projects that same day.

8. **Brainstorm solutions and select prototype projects.** This step is critical to the success of the entire retreat and must be handled with care. The objective is for the Lab team to form into a "single intelligence," to engage in a flow of improvisation and dialogue during which three or four breakthrough solutions to the system challenge are identified. The group might use a number of processes, but it's essential that participants continue to think out of their primary knowing, with their hands and heart.

   To encourage acting out of primary knowing, participants can brainstorm leverage points and record them on hexagon-shaped pieces of paper that can adhere to walls or other surfaces and be easily moved around or removed. Many groups identify one hundred or so leverage points, which they then categorize and reduce iteratively to a small, final number.

We encourage our Leadership Lab teams to then break into subteams around those leverage points (usually five or six), and to model them with physical objects. These subteams present their models to the group and further whittle them. The goal is to arrive at two, three, or perhaps four prototype projects the group believes will offer the most leverage for shifting the system.

9. **Develop plans for implementing the initiatives.** New subteams now form around each prototype project. These subteams will stay intact during the prototyping stage (see Practice 4.1). The teams make initial plans for the prototype experience as the last collective effort during the retreat. Each prototype team is assigned a guide who is experienced in facilitating rapid prototyping. Each team also plans to make a presentation to the sponsors describing the proposed prototype and requesting additional resources to enable the completion of Phase I Prototyping.

Tips

The Solo forms the heart of the wilderness retreat experience. As much as possible, resist pressure to shorten its length. The entire retreat should last six or seven days and the Solo itself should include two full nights.

Applicable Texts

Brown, Juanita. *The World Café: Bringing Conversations to Life*. (Berrett-Koehler, forthcoming).

Jaworski, Joseph et al. “Setting the Field: Creating the Conditions for Profound Institutional Change.” May 6, 1998. Available at www.generonconsulting.com.

Jaworski, Joseph, and Scharmer, C. Otto. “Leadership in the Digital Economy: Sensing and Actualizing Emerging Futures,” p. 32. (Society for Organizational Learning, 2000).

Kahane, Adam. *Solving Tough Problems.* Chapter: “Closed Fist, Open Palm.” (Berrett-Koehler, 2004).

Milton, John. “Sacred Passage and the Way of Nature Fellowship.” Available at www.sacredpassage.com

Scharmer, C. Otto. *Theory U: Leading from the Emerging Future*. (Forthcoming).

Senge, Peter, C. Otto Scharmer, Joseph Jaworski, and Betty Sue Flowers. *Presence: Human Purpose and the Field of the Future* (SoL, 2004).

PART 4: REALIZING

When Leadership Lab participants return from the wilderness retreat (or a functional equivalent), they often feel a deeper connection to their individual and collective self ("who we are") and a clearer sense of purpose ("what we are here for"). Sustaining this connection and clarity is critical to the success on the right-hand side of the U—which deals with bringing the new into reality "as it desires."

But now the task is to move new insights into action and bring the new reality into the world. The following practices describe the processes of prototyping and creating learning infrastructures that we consider cornerstones of this move from thought and reflection toward action.

Practice 4.1
ENACTING AND PROTOTYPING LIVING MICROCOSMS OF THE NEW

After the experience of presencing, the Leadership Lab team must move to the realm of concrete action. Teams do this through prototyping and small-scale, rapid experimentation. The key is to access and integrate the wisdom in our hands, heads, and hearts by conducting fast-cycle local experiments in which learners put into playful action the ideas they've developed throughout previous stages. The objective is to co-create living microcosms of the emerging whole. Thus the prototypes and small experiments should contain the core idea of what the team wants to create. Such a microcosm allows a team to learn by doing.

The other core function of a prototype is to generate feedback from key stakeholders. Based on this feedback, the team can adapt and iterate the prototype. Thus the process is iterative: People enact incomplete, roughly tested solutions out in the world and go through many small U's as they create, learn from, and fine-tune the new system they're bringing into existence. For example, if a group encounters immovable obstacles, members might decide to take a mini-break, embark on a new set of mini-learning journeys, and then return with fresh insights into how to deal with the issue at hand.

Purpose

To move toward action and create a living or strategic microcosm that functions as a "landing strip" for the future that wants to emerge

Outcomes

A set of living examples that enable participants to
- Enact their ideas in experimental prototypes
- Generate feedback from key stakeholders
- Use fast-cycle iteration to incorporate the feedback into the prototype through learning by doing

Illustrative Process

Prototyping and experimenting don't involve a workshop session. Rather, after the wilderness retreat, team members build and test early examples of solutions out in the world through a field of generative interactions with key stakeholders of the project initiative. Based on the feedback they obtain, they keep innovating and refining solutions at a rapid clip.

We encourage our teams to use the following basic process, while understanding that experienced practitioners will revise or build on this process based on their own situation:

1. **Present preliminary findings to key sponsors and allies.** This step enables participants to confirm (or create) the team's intention and commitment and secure

the resources needed for the prototype projects. It also keeps sponsors on board and connected.

2. **Refine the problem statement.** Based on the feedback from sponsors and other stakeholders, the team refines its statement about what it has set out to achieve. The quality of the prototyping process is a function of the quality of the problem statement. Having a precise statement doesn't mean that a team is stuck with that. Leadership Lab participants must allow room for emerging ideas to show up—even those that seem tangential. But a clear statement does help a team be more precise in its observation and iteration activities.

3. **Define relevant knowledge areas and contexts.** Identify knowledge areas and contexts that must be tapped for participants to develop the prototype. For example, when redesigning the innovation process in a global oil company, the respective prototype team went outside of its industry and visited the most interesting examples of innovative companies in order to learn from their processes and cultures of innovation.

4. **Immerse yourself in these contexts (mini-learning journeys).** The prototype teams gather and convene the knowledge, tools, and partners they need to move forward. Core team members share what they've learned and brainstorm ideas for innovative solutions. This moving out (into contexts) and returning back with new observations that are shared among the team members can enable the group to generate new ideas about how to iterate the initial prototype. It's a bit like breathing: You move out by testing and observing; you return back by sharing, brainstorming, and iterating.

5. **Break the total problem into components and prototype the best ideas for each component.** As long as participants continue sharing ideas and reintegrating the various components, it can be helpful to break a problem into smaller parts to reduce complexity. Immerse yourself in the details of a problem component to avoid getting stuck in pondering the whole.

6. **Present component prototypes and integrate the most successful components into a comprehensive solution.** Use the best ideas that have emerged from the work on the various components to return to the design and integration of the whole.

7. **Don't be shy about presenting prototypes in early stages.** As the designers at innovation firm IDEO say, prototyping means "to present a concept before you are done." While the mantra on the left-hand side of the U is "observe, observe, observe," the mantra on the right-hand side is "iterate, iterate, iterate."

Tips

The goal of prototyping is to live and improvise in real-time dialogue with "the universe"; that is, in dialogue with the various contexts at issue. To achieve this, participants must cross the threshold of conventional action (such as implementing a set of given blueprints). Instead, they evolve the blueprint as they go. To help the team operate this way, encourage the team to conduct daily after-action reviews whereby members assess what direction the change process is taking, what is working and what isn't, and what they should focus their efforts on during the upcoming days.

Applicable Texts

Kelley, Tom. *The Art of Innovation: Lessons in Creativity from IDEO, America's Leading Design Firm*. (Currency, 2001).

Scharmer, C. Otto. *Theory U: Leading from the Emerging Future*. (Forthcoming).

Senge, Peter, C. Otto Scharmer, Joseph Jaworski, and Betty Sue Flowers. *Presence: Human Purpose and the Field of the Future,* Chapter 11. (SoL, 2004).

Practice 4.2
BUILDING PARALLEL LEARNING INFRASTRUCTURES

To effect innovation or change, leaders need help. The most effective way of garnering this help is to create what we call an infrastructure for parallel learning. This infrastructure enables leaders to link with and learn from practitioners at other organizations who have "been there" and engaged in similar efforts in a different context. This practice lays out guidelines for building such parallel learning infrastructures.

Purpose

To help leaders, teams, and participants in cross-organizational initiatives cope with the generic challenges of leading innovation and change better and faster

Outcomes

- A safe place in which participants can engage in shared reflection on the progress, failures, and current situation of their innovation or change initiative
- A safe practice field in which leaders and teams can learn to acquire and work with new tools that they apply to their project
- A generative environment for cross-team coaching, helping, and inspiring: peer based cross-team coaching is one of the most effective mechanisms for "scaling up" scarce consulting resources
- A place that allows for re-linking with and crystallizing a deeper sense of collective intent ("what we're here for")
- A place that enhances cross-team alignment and synergies as Lab participants act on this intent ("what we want to create")

Illustrative Process

As with prototyping, parallel learning isn't limited to a workshop session. Rather, team members go through the cycle of testing pilot experiments, observing the results, and implementing that feedback into the next iteration quickly and repeatedly. Parallel Learning Infrastructures accelerate the cross-fertilization of ideas across teams and initiatives in real time rather than after the fact. They enable key players to periodically (e.g., daily, weekly, monthly, quarterly, and/or as needed) learn from one another and revise their projects. Thus parallel learning is also iterative, as participants take breaks and revisit other steps in the U as needed.

As the guide for this process, the facilitator serves as a kind of process consultant and "improvisation master." Thus the facilitator:

- Regularly reminds Leadership Lab participants to keep their original intention in mind while playing, experimenting, and revising
- Helps them tap into the tacit knowledge residing within or across groups

- Suggests when subteams might split up to enact prototypes or pilots and when they might reconvene to share feedback and help one another identify opportunities for breakthroughs
- Creates spaces in which team members can gather to review their prototyping and pilot experiences
- Connects them with allies who can provide the resources and support necessary to succeed
- Helps team members meet deadlines for solution creation and refinement, and remind them that they'll be presenting their results to a high-level review committee
- Redirects participants' attention from their internal discussion to external stakeholder feedback as needed
- Helps people move through the shock of acting, and reminds them that they're now deeply embedded in the creating phase. Lab participants are no longer just *talking* about problems and possible solutions; they're *moving* to change reality. Some individuals may experience a feeling akin to shock as they make this transition. They may also find the experience of transitioning in and out of the "old" system to be traumatic.

This process consists of several iterative steps through which you can guide participants each time they reconvene:

1. **Encourage sharing of experiences and challenges.** Have teams present their accomplishments, their learning experiences, and their key issues where they most need help.

2. **Invite peer coaching across team boundaries.** Ask subteams to provide peer coaching for one another. Through coaching, teams help each other make deeper sense of what they're seeing as they test pilot projects out in the world.

3. **Create an interpersonal parallel learning process.** For example, through one-on-one dialogue, walks, or storytelling across teams, participants can exchange ideas and feedback.

4. **Review.** Ask teams to review the real-world testing they've been doing. Ask, "How does what's happening compare to your initial goals, intentions, and plans? What changes, if any, do you think would enhance the effectiveness of your pilot projects?"

5. **Adapt action planning.** Have teams focus on crystallizing their next steps: Who does what by when?

The overarching goal of these steps is to create an environment in which people know that they have one another's and your support and commitment to the process. Point out how they've acted as a single intelligence in earlier stages of the change effort, and that parallel learning enables them to return to that mode of operation better and faster. Reassure them that it's normal to feel upended while transitioning in and out of the old system.

Tips

- **Encourage honesty during review meetings,** by asking people to describe where they are as individuals and as a team. Ask, "How does where we are compare to where we intended to be?"
- **Remind teams to serve as process consultants for one another.** By doing so, participants help each other clarify and address gaps between their actual progress and their original plan, withhold judgment about any gaps, provide frank and intelligent feedback, and suggest times when it might be beneficial to retreat again and review their project plans. Remind people that to serve as effective process consultants, they must be able to shift their focus from their own to *others'* work. Encourage members from different teams to ask generative questions of one another; for example, "Have you tried X? If not, what has prevented you from doing so?" Also invite team members to present the results of their prototypes in ways they haven't thought of before, to see what new insights might emerge.
- **Interweave multiple levels of teamwork during review meetings.** For example, an individual from one subteam may describe a pilot project's insights to another subteam. Individuals may discuss their projects in the presence of the entire group of subteams. Members within a subteam may dialogue with each other. Two subteams may get together and explore insights on one team's pilot project. One team may present feedback from another team to the entire group. Ensure that learning and support take place on as many different levels as possible.
- **Ask whether people need additional resources to refine prototypes.** If so, ask, "Which resources do you need? How might you best obtain these resources from those who must approve and provide them?"
- **Pay attention to other limiting factors.** Identify factors that, if removed, could accelerate and multiply the team's effectiveness.
- **Tap into the group's collective, tacit knowledge.** Ask, "What key *commonalities* are different teams experiencing with their prototypes? What key *differences* are you seeing across teams and prototypes? Where in the system do the most powerful levers for change seem to exist?"

Applicable Texts

Schein, Ed. *Process Consultation Revisited: Building the Helping Relationship*. (Addison-Wesley, 1999).

Senge, Peter, C. Otto Scharmer, Joseph Jaworski, and Betty Sue Flowers. *Presence: Human Purpose and the Field of the Future*, Chapter 12. (SoL, 2004).

GLOSSARY

Field. A nonmaterial region of influence—an invisible force that structures space and behavior. We are all connected through and operate within living fields of thought, perception, and emotion, and the constantly evolving interplay of these give rise to new realities.

Foundation Workshop. The initial gathering of Leadership Lab participants for the purpose of moving a change effort forward.

Generative Interview. A conversation conducted to convene Leadership Lab participants and to learn more about the system in question.

Generative Scenario. A story about how the system that Leadership Lab members are working on may evolve in the future, and what their role in it might be.

Pilot Project. A resource-intensive experimental solution to a systemic challenge that Leadership Lab members test in the real world and then refine.

Presencing. The space in which Leadership Lab participants access their sources of primary knowing before co-creating solutions to the systemic challenge at hand.

Prototype. An experimental solution to a systemic challenge that Leadership Lab members test in the real world and then refine.

Realizing. The space in which Leadership Lab participants collaboratively create, test, refine, and institutionalize solutions to the systemic challenge at hand.

Self. An individual's highest potential.

Sensing. The space in which Leadership Lab participants tune into emerging patterns of future possibilities for the system they're working on.

Source. The wellspring for primary knowing about and commitment to the system that Lab members are working on.

Strategic Microcosm. A Leadership Lab team whose members represent the diversity of the system in question.

Coming Soon!

Solving Tough Problems
An Open Way of Talking, Listening, and Creating New Realities
By Adam Kahane
Foreword by Peter Senge

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