

The slide above is a modified version of a diagram from the book ["Presence: Human Purpose and the Field of the Future"](#) by Peter Senge, et.al. In the book, the diagram is on page 225 and is entitled: "Seven Capacities of the U Movement" (Google the slide title under "web", not "images" for a printable PDF version). The diagram summarizes most of what is covered in the book, which is an expensive, but worthwhile read for serious students.

If we would like to get more, big **Aha's** (at the bottom of the "U") in our management meetings, as well as increase our "capacities" to successfully implement them, then we need to get better at all 9 "capacities" listed in this slide. Here are some brief comments on each capacity:

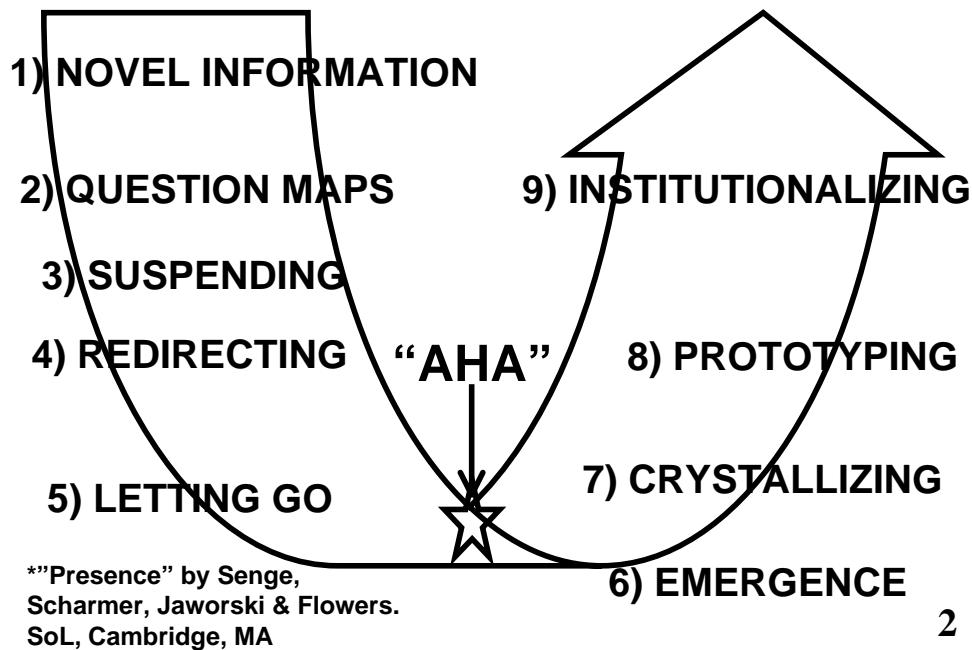
1. Novel Information:

If we want to find new, uncontested ways of creating and delivering profitable value to customers, it helps to look at all aspects of our businesses through different analytical lenses using different metrics. If, for example, we rank our active customers from high-to-low by estimated profitability using a simple, first-approximation activity cost model, we find that the top 10% can typically generate almost 100% of our current operating profit; the top 20% up to 150%; while the bottom 1% cost us about 20% of our profits due to little margin and high transactional activity cost.

By interviewing the very few – super profitable, super losing and super growing – customers in depth, what new information do we find from these high-potential accounts that sparks what new theories about how we might co-create next level value for the interviewees and a few other customers just like them?

There is no shortage of ways that we can re-analyze a company's competitive reality and future opportunities, what often is missing is a systematic listing of the right questions about all of this information. The questions in turn can lead to a much richer dialogue. Time for step 2.

STEPS TO BREAKTHROUGH RESULTS



2. Question Maps:

As we look for and gather new informational insights at the living and dying edges of our businesses, we need to practice – phrasing, writing down, editing and sequencing for discussion – the best, right questions. Too often we rush to simple conclusions based on too few data points and applying old model thinking. We then start experimenting on the wrong things in the wrong ways.

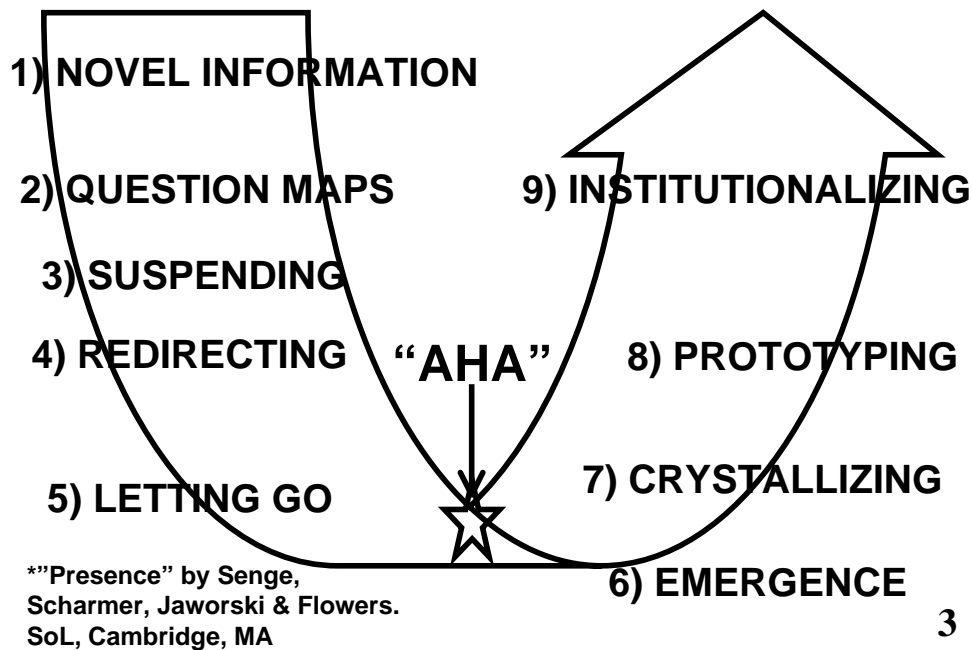
If we are going to pioneer new value creation opportunities, we might experiment with group created “question maps”. A team works to formulate questions about some new potential space with the rule that no one can jump to conclusions. It’s OK to first state some facts and assumptions as lead-ins to a question – just no answers or rhetorical questions. After question ideas are exhausted, the team should self-organize about how to edit the questions and then sequence them in some chronological format, perhaps with sub-title groupings. Then the dialogue can commence in which everyone thinks about how they are thinking individually and as a group, so that all (unspoken) assumptions and old mental models are shared and tested. Some examples of question maps for different subjects can be found in exhibits 30-33 at www.merrifield.com.

3. SUSPENDING:

This step is “thinking about how we think”. Groupthink is present, for example, at every management meeting, and it can be very judgmental and coercive, especially if this collective censor is unrecognized. If top management critiques our ideas, we have three main choices:

- we can defend our position against groupthink;
- we can say nothing, conform and go along; or,
- we can sincerely inquire about our critics underlying assumptions that have led them to see things differently. Exhibit 34 (all “exhibits” in this note are at <http://www.merrifield.com/>), which is entitled “cycle of mental model thinking”, goes into greater how-to detail on how we can suspend our reflexive, groupthink activity.

STEPS TO BREAKTHROUGH RESULTS



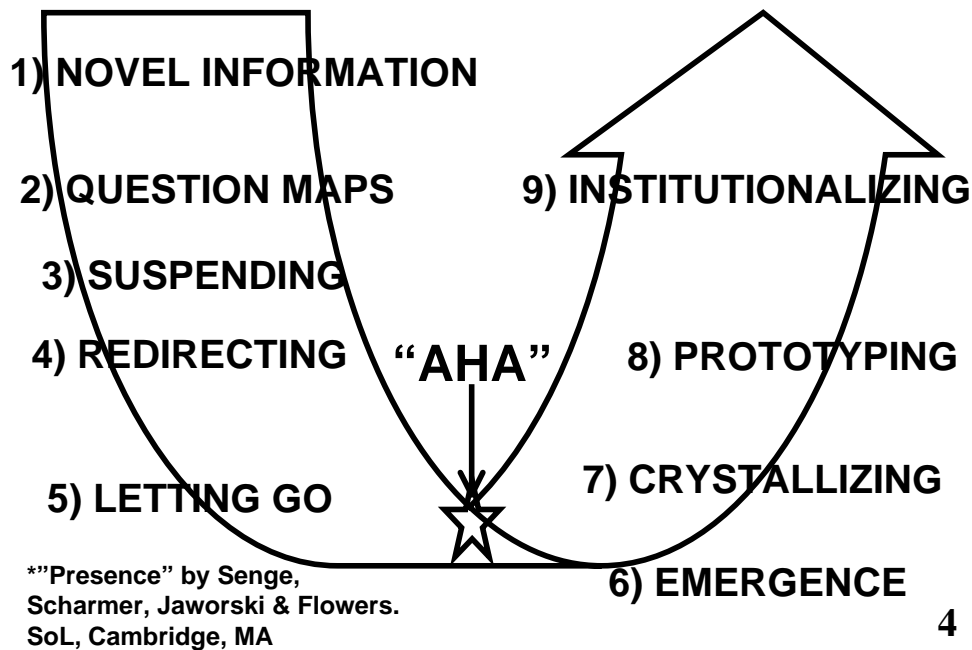
The net result of successful “suspension” is that a group of two or more can enter into a safe “dialogue” space. (For more on “dialogue” see Exhibit 6.). To dialogue well, we will have to be able to slow down and become aware of our own thought stream. We will also have to be able to deal with our individual and collective fears and anger that may arise when our unspoken assumptions are revealed as being simplistic, dated, selfish, etc. For many, the distress caused by the unpacking of old, unspoken, mental models will outweigh the sense of illumination and empowerment felt by the few.

4. REDIRECTING:

This concept deals with stepping back, looking at the big picture instead of the little, isolated, fragmented parts of any complex issue involving humans. We should focus on how all the elements are dynamically interconnected and alive and where there is momentum flow. Problem solving is good for technical problems – get the manual and fix it – and very simple systems in which all variables are knowable and predictable. Business ecosystems populated by emotional, irrational humans can’t be “fixed” so easily. A key, redirecting moment for a group is when everyone stops trying to come up with either a quick, analytical, recipe solution for the superficial “problem” or to pin the blame on specific people or parts of the organization, and notices:

- “Look at what WE are systemically doing to ourselves;
- Every individual/department/profit center will have to change in order for the whole to be more successful, which in turn will lift us all to the next level;
- We can’t continue to optimize our own piece of the system for short-term, myopic results while slowly killing the bigger, company system that feeds us all.”

STEPS TO BREAKTHROUGH RESULTS



5. LETTING GO:

Even after “redirecting” to get a better group feel for the bigger, dynamic system that enmeshes us, we will still want to reflexively apply our old mental models and solutions to newly emerging opportunities. One method for helping a team to further “let go” of applying old thinking is to use future scenarios that can get around individual, defensive, turf positioning and protection.

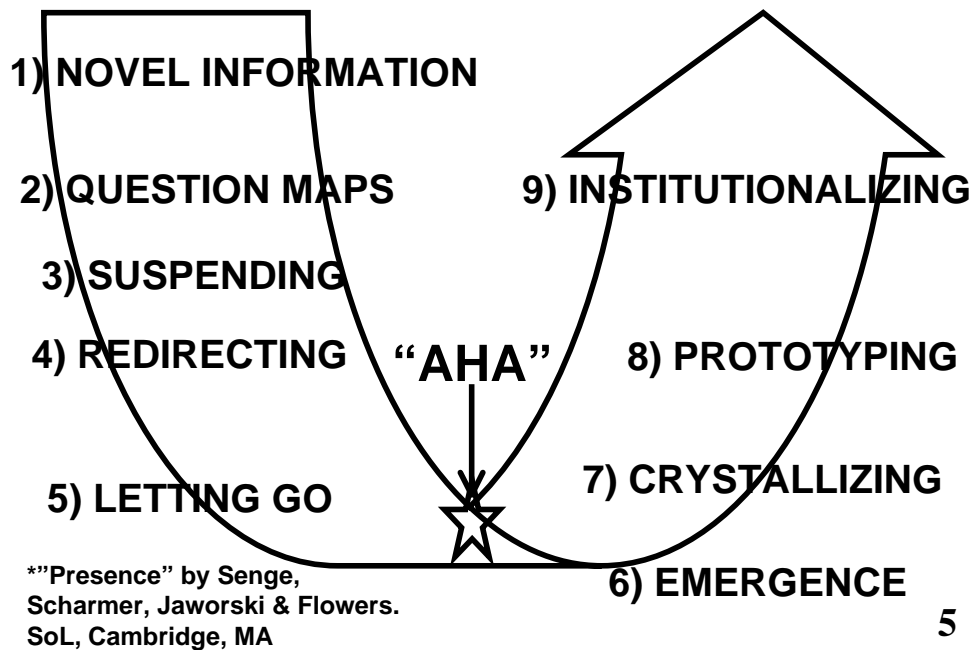
But, we may still be lacking the big **Aha**. After:

- Lots of observation
- Becoming one with the bigger, inter-connected system and ecosystem that envelops us
- Discussing and reverently unpacking old mental models and psychological comfort-zoning new approaches for new scenarios, it may be time to
- Retreat, relax, gestate and reflect on what has been discussed to allow our “inner knowing” to emerge.

Letting go can be a struggle. We may have to give up some of our “attachments” that are part of our personal, egocentricity. We have to stop watching for what we habitually expect to see or hear. We may get bored with the stillness, the silence and the lack of any big **Aha** emerging.

In a group setting, it is helpful if leaders confess that they are struggling and trying to see the issues with both mind and heart. Heartfelt statements asking for group help can often open up a space in the conversation. In this new space, there can then be a change in the quality of attention from looking for to letting something emerge. This new quality of attention is looking for ideas to emerge and present themselves rather than someone offering stored re-presentations from old thinking. Our minds and hearts are open rather than determinate. We are waiting for unconditional value rather than quick, conditional, pragmatic usefulness that fits into our old-world thinking.

STEPS TO BREAKTHROUGH RESULTS



★ THE AHA MOMENT:

The **Aha** moment happens at the bottom of the U. In an instant, some insight emerges that switches us or the group from the letting go process to the “emergence” one. These three steps – letting go, **Aha**, emergence – can blend together and sometimes oscillate back and forth.

For examples, two familiar, historical, scientific **Aha** stories are:

- Archimedes sitting down in the bathtub to then declare “Eureka” (“I found it”: a way to prove the King’s crown is pure gold without scratching it.)
- Isaac Newton being hit on the head by a falling apple while sleeping under an apple tree sparking his invention of calculus to prove the math of gravity which then lead to his three laws for motion.

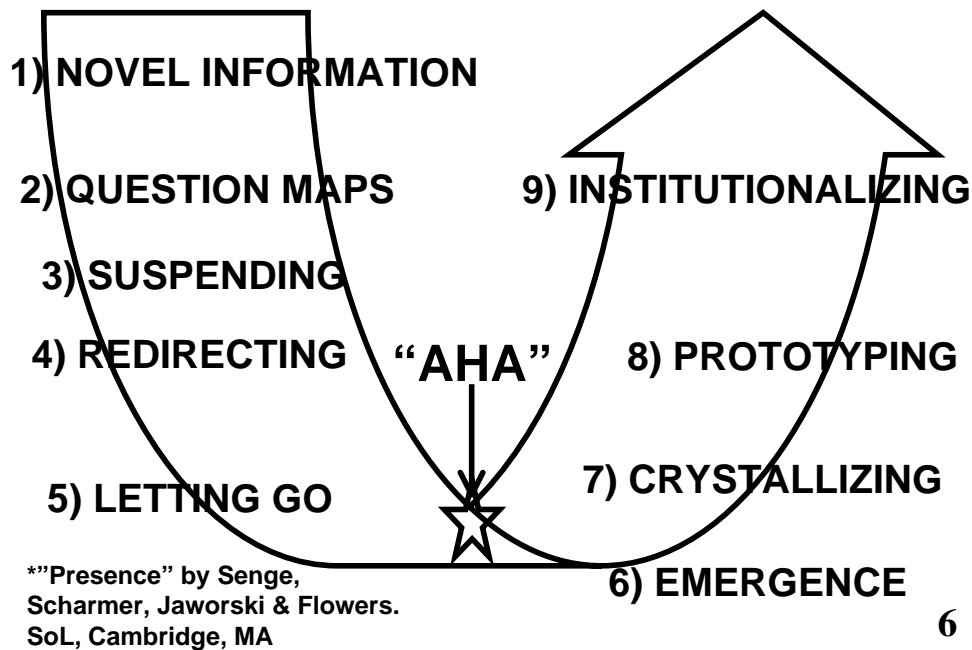
There have also been many spiritual **Aha**’s recorded in holy books that are termed: “revelations, enlightenment, epiphanies, or moments of grace”.

Whenever and wherever these moments occur, they can seem to be magical and sometimes evanescent. How do we grab a hold of them and develop them into a useful, motivating vision?

6. EMERGENCE:

Even when an **Aha** arrives, not everyone sees it or understands it enough to want to move forward with it. We don’t, initially, have our best, new, most compelling words, metaphors, and examples for describing and selling the new possibility. One to a few people really have to work hard at describing the **Aha** in a clear, motivating way. They must “crystallize the intent”, create a compelling vision.

STEPS TO BREAKTHROUGH RESULTS



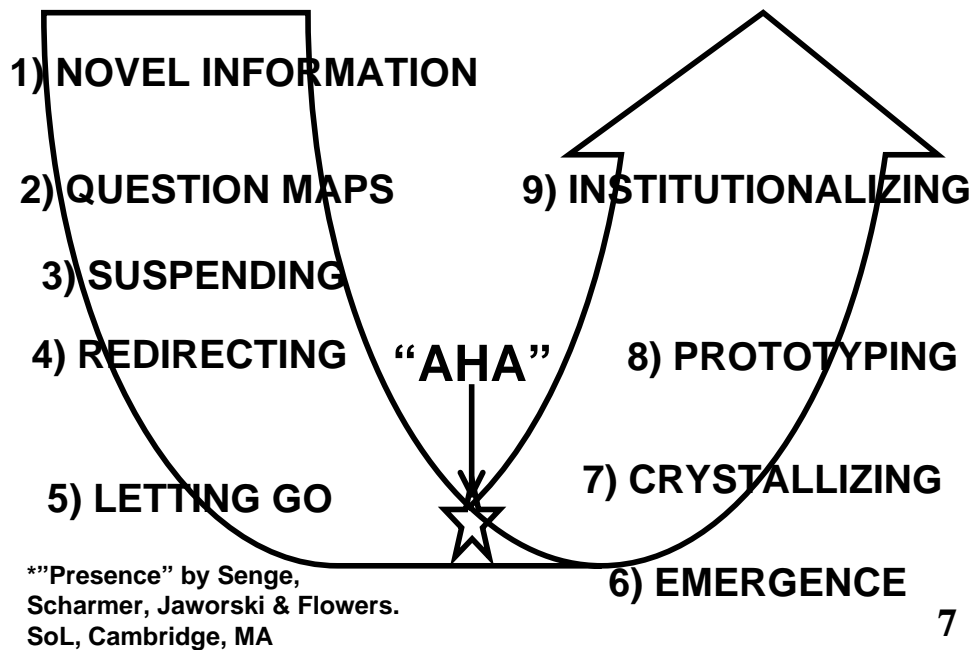
7. CRYSTALLIZING INTENT (the vision thing):

Visions don't have to be initially perfect, they just have to be good enough to get things started. Visions that come from a place of powerlessness are doomed as are ones that are developed too far up the left side of the U, because they are still trying to solve new opportunities with old thinking by 1 or 2 people who impose them upon a group. When, however, people are really connected to one another and to their larger ecosystem reality, there's a different feeling in the room. Effective visions are uncovered, not manufactured by some top-down mechanical process.

The challenge in this step is to translate the intuitions that arise at the bottom of the U into concrete images that can recruit more volunteers to the new cause, it helps to have a core of 3 to 10 key people. It takes a small, dedicated band to generate enough momentum to make intuitions concrete, seem real and appear to be reachable.

An excellent example of a few key people crystallizing a vision is the writing of the U.S.'s founding documents. After much dialogue and many epiphanies, Thomas Jefferson principally authored the U.S. Declaration of Independence, and then later, James Madison did the same for the drafting of the U.S. Constitution and the Bill of Rights. Could a small group of founding fathers then sell a revolutionary form of government to 13 independent colonies? As Margaret Mead once said: "Never doubt that a small group of committed citizens can change the world. Indeed, it's the only thing that ever has." And, timing was important too; as Victor Hugo stated: "nothing is as powerful as an idea whose time has come".

STEPS TO BREAKTHROUGH RESULTS



Initial visions should be flexible. They are alive only in the moment that we see and choose them. First steps are often small, it is not the grandiosity of the vision, but what the vision does. As Mother Theresa said: “You can not do great things, only small things with great love.”

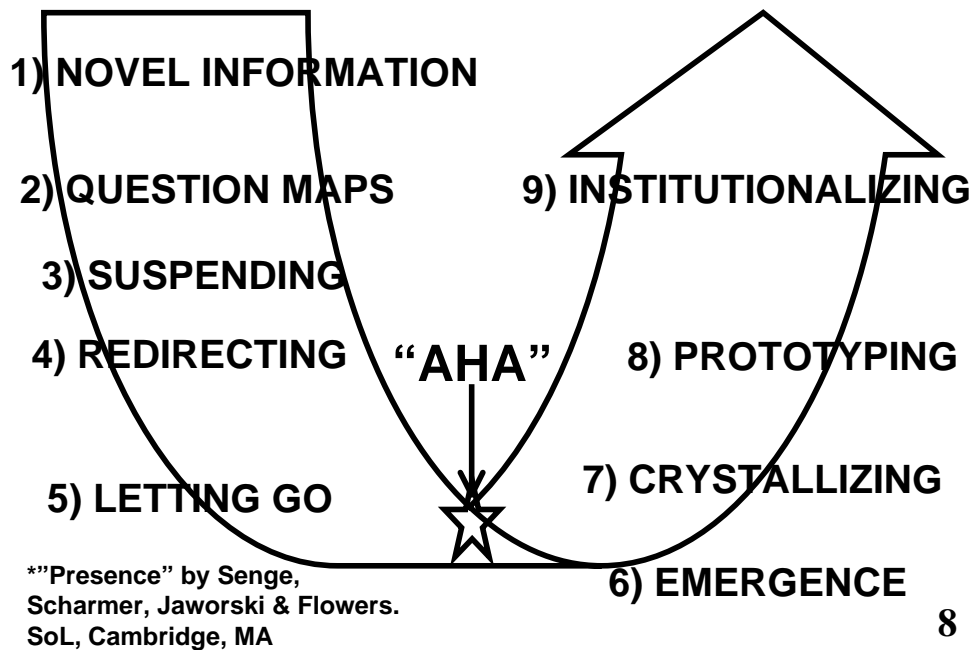
8. PROTOTYPING:

Turning an idea into a new business (division) is a daunting task. To avoid initial fears of failure and analysis-paralysis, it helps to do many quick, cheap, simple experiments if possible. For 10% of the cost of doing a comprehensive startup, can we achieve 50% or more of what we want to accomplish and get a lot of learning by doing? These “prototypes” of the final thing can embody our best current understanding of what we think we know, and they can serve as communication tools to get others involved.

Because we are creating a new path, there is not a recipe, a best-practice book, a detailed map or an experienced expert to refer to. We have to feel our way along keeping one eye on our guiding, North Star vision. For positive energy and motivation, we also have to stay connected to our deepest sources of inspiration. We will learn by doing. We will create and adjust, fail forward, learn and try again trying to stay in the natural flow of things.

While prototyping forward we must listen to feedback from all sources. The world actually wants to help noble experiments, so if we keep an honest ear and the right to modify our vision and our experiments, the odds of eventual success go up. Different people in a group will see, hear and learn different things as well as having differing degrees of flexibility in their thinking. The result is that there will be fragmentation or disagreement within a founding group on which development paths to take. There is no single right way to maintain connection to the vision, but the common vision must be clear and strong enough to minimize the forces of fragmentation.

STEPS TO BREAKTHROUGH RESULTS



9. INSTITUTIONALIZING:

If we succeed in creating a new solution, how do we turn it into a long-lasting success? How do we institutionalize this success? How do all of the people involved in the venture learn to embody the right values that will contribute to this success? Governing ideas in some sort of constitution or mission statement can be critical. Enron, Worldcom and Tyco all had, for example, value statements that were no check against the ambition and personal greed of the executives. On the other hand, the governing ideas of the U.S. Constitution compelled Lincoln and the “Union Army” to go to war with the Confederate “Rebels”.

We need to make sure that all old and new successes have the right values and governing ideas woven effectively into and around them.