



Leadership Agility: From Expert to Synergist

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As someone with leadership responsibilities, no one needs to remind you that we live in a global economy that constantly bombards us with change and complexity. Every year, new technologies, markets, and competitors emerge at an ever-increasing pace. As change accelerates, so do novelty and uncertainty. Future threats and opportunities become harder to predict. We also live in an increasingly complex, interconnected world, where quality attention to internal and external customers, strategic allies, and other stakeholders is essential for business success.

The Need for Agility

While specific future developments are increasingly difficult to predict, there are two deep trends we can predict with great certainty: The pace of change will continue to increase, and the level of complexity and interdependence will continue to grow. For over a decade, organizational change experts, acutely aware of these powerful trends, have been talking about the need to develop “agile” companies — organizations that anticipate and respond rapidly to changing conditions by leveraging highly productive internal and external relationships.

To enjoy sustained success, companies need to develop a level of organizational agility that matches the increasing level of change and complexity in their business environment. Yet, for the vast majority of companies, full-fledged strategic and operational agility is still more an aspiration than a reality. One of the major reasons for this continuing “agility gap” is the need to develop more agile leaders. To develop teams and organizations with the level of agility demanded by today’s turbulent business environment, companies need leaders who embody a corresponding level of agility.

It’s no wonder, then, that senior executives have ranked agility among the most critical leadership competencies needed in their companies today.¹ What is leadership agility? In essence, it’s the ability to lead effectively under conditions of rapid change and mounting complexity. Because these trends affect all managerial levels, this is a competency that’s increasingly needed not just in the executive suite but throughout the organization.

Research reported in our forthcoming book, *Leadership Agility* (Jossey-Bass, 2006), shows that there are five distinct levels in the mastery of this vital competency. Each new level of agility represents an ability to respond effectively to an increased level of change and complexity. Strikingly, this research indicates that only about 10% of managers have mastered the level of agility needed for consistently effective leadership in today’s turbulent world economy.

In the chart below, you will find profiles that show how managers at each level of agility conduct themselves while carrying out initiatives in three action arenas: leading organizational change, improving

team performance, and engaging in pivotal conversations. Based on data collected from over 700 managers, about 90% of managers operate at the pre-Expert, Expert, or Achiever levels of agility.

Quick Reference Guide to Five Levels of Leadership Agility

Level of Agility	View of Leadership	Agility in Pivotal Conversations	Agility in Leading Teams	Agility in Leading Organizational Change
Pre-Expert (~10%)				
Expert (~45%)	<i>Tactical, problem-solving orientation.</i> Believes that leaders are respected and followed by others because of their authority and expertise.	Style is either to strongly assert opinions or hold back to accommodate others. May swing from one style to the other, particularly for different relationships. Tends to avoid giving or requesting feedback.	More of a supervisor than a manager. Creates a group of individuals rather than a team. Work with direct reports is primarily one-on-one. Too caught up in the details of own work to lead in a strategic manner.	Organizational initiatives focus primarily on incremental improvements inside unit boundaries with little attention to stakeholders.
Achiever (~35%)	<i>Strategic, outcome orientation.</i> Believes that leaders motivate others by making it challenging and satisfying to contribute to larger objectives.	Primarily assertive or accommodative with some ability to compensate with the less preferred style. Will accept or even initiate feedback, if helpful in achieving desired outcomes.	Operates like a full-fledged manager. Meetings to discuss important strategic or organizational issues are often orchestrated to gain buy-in to own views.	Organizational initiatives include analysis of external environment. Strategies to gain stakeholder buy-in range from one-way communication to soliciting input.
Post-Heroic				
Catalyst (~5%)	<i>Visionary, facilitative orientation.</i> Believes that leaders articulate an innovative, inspiring vision and bring together the right people to transform the vision into reality. Leaders empower others and actively facilitate their development.	Adept at balancing assertive and accommodative styles as needed in particular situations. Likely to articulate and question underlying assumptions. Genuinely interested in learning from diverse viewpoints. Proactive in seeking and utilizing feedback.	Intent upon creating a highly participative team. Acts as a team leader and facilitator. Models and seeks open exchange of views on difficult issues. Empowers direct reports. Uses team development as a vehicle for leadership development.	Organizational initiatives often include development of a culture that promotes teamwork, participation, and empowerment. Proactive engagement with diverse stakeholders reflects a belief that input increases the quality of decisions, not just buy-in.
Co-Creator (~4%)	<i>Oriented toward shared purpose and collaboration.</i> Believes leadership is ultimately a service to others. Leaders collaborate with other leaders to develop a shared vision that each experiences as deeply purposeful.	Integrates his/her assertive and accommodative sides in pivotal conversations and is agile in using both styles. Able to process and seriously consider negative feedback even when highly charged emotionally.	Develops a collaborative leadership team, where members feel full responsibility not only for their own areas but also for the unit/organization they collectively manage. Practical preference for consensus decision-	Develops key stakeholder relationships characterized by deep levels of mutual influence and genuine dedication to the common good. May create companies or organizational units where corporate responsibility and deep

			making but doesn't hesitate to use authority as needed.	collaboration are integral practices.
Synergist (~1%)	<i>Holistic orientation.</i> Experiences leadership as participation in a palpable life purpose that benefits others while serving as a vehicle for personal transformation.	Centered within his/her assertive and accommodative energies, expressed appropriately to the situation. Cultivates a present-centered awareness that augments external feedback and supports a strong, subtle connection with others, even during challenging conversations.	Capable of moving fluidly between various team leadership styles uniquely suited to the situation at hand. Can shape or amplify the energy dynamics at work in a particular situation to bring about mutually beneficial results.	Develops and maintains a deep, empathetic awareness of conflicting stakeholder interests, including his/her own. Able to access "synergistic intuitions" that transform seemingly intractable conflicts into solutions beneficial for all parties involved.

Note: Each level includes and goes beyond the capacities and skills developed at previous levels. Percentages refer to research-based estimates of the managers currently capable of operating at each agility level.

The Expert level, with its tactical, problem-solving orientation, is best suited for relatively stable environments where complexity is fairly low. The Achiever level, with its strategic, outcome-orientation, is effective in moderately complex environments where the pace of change is moderate and episodic.

The predominant combination of Expert and Achiever leadership worked relatively well for most companies until the waning decades of the 20th century, when the globalization of the economy ushered in an era of continuous change and growing interdependence. Generally speaking, consistently effective leadership in this uncertain environment requires mastery of the visionary, facilitative orientation found at the Catalyst level of agility.

Post-heroic Leadership

Managers who operate at the Catalyst level of agility have a different mindset about what it means to be a leader. In their book, *Power Up: Transforming organizations through shared leadership*, David Bradford and Allan Cohen distinguish between "heroic" and "post-heroic" leadership. We found that managers at the Expert and Achiever levels of agility operate from an heroic leadership mindset. That is, they assume sole responsibility for setting their organization's objectives, coordinating the activities of their direct reports, and managing their performance. The following client story provides a real-life example of the difference that Catalyst-level leadership can make.

Catalyst-level Leadership

Robert faced the biggest leadership challenge of his career. A Catalyst-level executive in a Canadian oil corporation, he'd just been named president of its refining and retailing company. Competitively, his company was positioned around the middle of the pack in a mature, margin-sensitive market where long-range demand was projected to be flat. With little to distinguish it from other regionals, its earnings were going steadily downhill. In fact, its future looked dismal.

Within the company, morale was at an all-time low. People at all levels were frustrated and unhappy. The previous president was an Achiever-level leader who had taken many steps to make the company more efficient, including a series of layoffs, but these steps had not produced the desired results. The whole

organization was in a state of fear. Privately, the outgoing president had been considering which division would have to be sold or shut down. As Robert moved into his new position, everything was truly up for grabs.

Over the next three years, Robert led his company through an amazing turnaround. At the end of this period, it not only survived without selling any of its divisions, it entered a phase of aggressive growth, clearing \$71 million a year more than it was when he took over. In the business press, the company went from being a “bad bet” to “one of the darlings of the stock market.” Why did Robert succeed when his Achiever-level predecessor did not?

The company badly needed a short-term increase in its stock price. But Robert wanted to do much more than that. He wanted to transform an admittedly lackluster company into the best regional in North America. In fact, his vision was to develop an organization whose business performance and innovative ways of operating would be benchmarked by companies from a wide variety of industries. By putting the stock price goal in this larger context, Robert overturned his predecessor’s assumption that the company’s options were limited to difficult but familiar cost-cutting solutions. Instead, he decided to develop a set of “break out” strategies that would develop a more innovative organization.

Realizing that he and his top management group might not have all the answers, Robert hired a world-class strategy firm. He also set up ten “idea factories:” creative strategic thinking sessions, where employees and other stakeholders developed ideas for the top team to consider. People responded with enthusiasm, generating a huge number of ideas.

Robert then held a two-day retreat where he and his top management group synthesized the strategy firm’s ideas with those generated by the idea factories. As he put it later, “We tried to involve as many people as possible in the strategic review process. We invested time and energy up-front to listen to people, build trust, and get everyone aligned. It paid off, because we started to think with one brain. Instead of being at cross-purposes, we could understand and support each other’s decisions.”

The new strategies that emerged went well beyond those Robert, his team, and the strategy firm would have generated on their own. They resulted in a smaller, more focused organization with a much stronger “people strategy” designed to catapult the company into the ranks of high-performing organizations. When the new game plan was ready, they presented it to the employees before they announced it to the market.

The presentation included some bad news, but as it ended people applauded. Over the months that followed, Robert and his team repeatedly communicated their new vision and its implications for employees in many different forums. As the new strategies were implemented, they kept everyone updated on the performance of the business. Every year, Robert met with each of the company’s twenty management teams to discuss objectives and strategies and check for alignment.

Robert’s participative approach to transforming his organization not only led to innovative strategies; it also developed the commitment, trust, and alignment necessary to implement them reliably and effectively. As a result, during his first three years as president, annual earnings went from \$9 million to \$40 million, and cash expenses were reduced by \$40 million a year. A once-faltering company had become one of the most efficient and effective refiners in North America and one of the top retailers in its marketplace.

Heroic leaders can be highly effective in certain situations. However, in complex, rapidly changing organizational environments, heroic leadership over-controls and under-utilizes subordinates. It discourages people from feeling responsible for anything beyond their assigned area, inhibits optimal teamwork, and implicitly encourages subordinates to use the heroic approach with their own units.

Catalyst leaders practice what Bradford and Cohen call post-heroic leadership. As you saw in Robert’s story, these leaders retain the ultimate accountability and authority that comes with their role, yet they create work environments characterized by high involvement and shared responsibility.

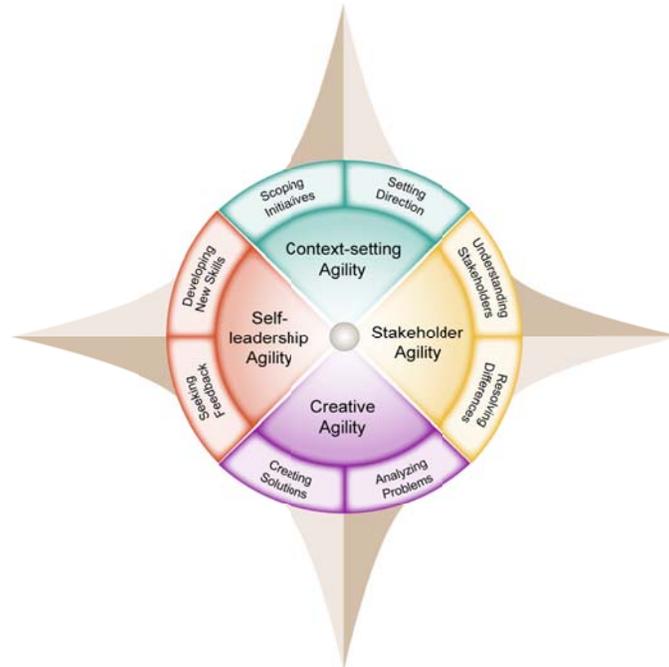
Leaders who function at the Co-Creator and Synergist levels retain and build upon their Catalyst capabilities. In addition to their very high levels of effectiveness, two facts about these rare leaders stood

out in the research: First, they live the conviction that leadership is a form of service toward that also brings inner fulfillment. They have such a strong commitment to social and environmental responsibility that they invariably include this commitment in their organizational change initiatives, whatever else these initiatives are intended to achieve. Some have left traditional corporations to found alternative institutions committed to these principles. Others have remained in influential positions within existing corporations, working with remarkable effectiveness to change them from within.

Second, a high percentage of Co-Creator and Synergist leaders have a regular meditation practice and have years of experience bringing a heightened level of awareness into their work as leaders.

The Four Types of Leadership Agility

To better understand leadership agility and the best ways to develop it, we conducted a multi-year research project that used questionnaires, in-depth interviews, and client case studies and journals to examine the thought-processes and behaviors of hundreds of managers. A key finding was that those leaders who are most successful in turbulent environments are skilled in exercising four mutually reinforcing types of leadership agility, represented below in the “Leadership Agility Compass.”



The Leadership Agility Compass

Context-setting Agility

Leaders use context-setting agility to scan their environment, anticipate important changes, and decide what initiatives they need to take. This type of leadership agility also includes the ability to determine the optimal scope of an initiative and the outcomes it needs to achieve. When leaders grow into the Catalyst level, they expand their thinking to include relevant longer-term trends that extend beyond the boundaries of their company's industry. When the timing is right, they have the ability to undertake visionary initiatives that are personally meaningful and beneficial for their organization and its key stakeholders.

For example, while Robert's Achiever-level predecessor focused on raising share price, Robert put this objective in a larger context. He created a vision of becoming the best regional in North America, an organization whose performance and innovative practices would be benchmarked by companies from many different industries.

Stakeholder Agility

Leaders use stakeholder agility to identify the key stakeholders of an initiative, understand what they have at stake, and assess the extent to which their views and objectives are aligned with their own. This type of leadership agility also includes the ability to engage with stakeholders in ways that lead to more optimal alignment. Catalyst leaders have an ability to enter deeply into frames of reference that differ from their own while still honoring their own perspective. They seek input from key stakeholders not simply to gain buy-in, but because they feel that genuine dialogue will improve the quality and effectiveness of their initiatives.

For example, while the former oil company president focused on shareholders and customers, Robert sought input from a wide variety of additional stakeholders in creating new strategies, including suppliers, bankers, environmental groups, industry thought-leaders, and a broad cross-section of employees. He and his management team sought this input not just to make people feel involved; they used it to help create their strategies.

Creative Agility

Leaders use creative agility to transform complex, novel issues into desired results. Catalyst leaders begin their initiatives with a keen appreciation of the novelty inherent in the situation they are addressing, even if it seems highly familiar. Because they have a deep understanding of the limitations of any single perspective, they conduct their initiatives in a manner that encourages the expression of multiple views and the questioning of underlying assumptions. When they encounter apparent opposites (short-term vs. long-term, practical vs. idealistic), their willingness to experience the tension between them increases their ability to discover creative solutions.

For example, Robert asked us to design and facilitate a series of "idea factories" that promoted creative thinking about strategic possibilities. He then arranged a two-day off-site meeting where we helped him and his team take the hundreds of ideas that were generated and creatively synthesize them with other ideas developed by his team and the world-class strategy firm. This process led to several important strategies that came almost exclusively from possibilities generated by employees and other stakeholders.

Self-Leadership Agility

In *Mastering Self-Leadership* Charles Manz and Christopher Neck say, “If we ever hope to be effective leaders of others, we need first to be able to lead ourselves effectively.” Managers engage in self-leadership by determining the kind of leader they want to be, using their everyday initiatives to experiment toward this aspiration, and then reflecting on these experiences. Catalyst leaders understand that their self-awareness is more partial than they assumed at previous levels. Consequently, they develop a strong interest in becoming aware of behaviors, feelings, and assumptions that would normally escape their conscious attention. They are motivated to increase their self-awareness and more fully align their behavior with their values and aspirations. As their self-awareness deepens and becomes more complete, they increasingly find that personal growth fuels their professional development.

Putting It All Together

Highly effective leaders use the four leadership agility competencies in concert with one another. While it is best to begin an initiative by explicitly setting the context, highly effective leaders begin to engage with stakeholders while they set the context for their initiatives. They also begin to think about ways they can use the initiative to stretch as a leader.

Creative agility is particularly useful in working on the specific problems and opportunities encountered in the process of planning and implementing an initiative. To maximize your effectiveness, you also need to engage key stakeholders in creative problem solving, and you need to be proactive in learning from your experience as you go along. In addition, new developments in the larger context may require you to use context-setting agility to reconsider your initiative’s scope and objectives.

Assessing Leadership Agility

As we noted earlier, the development of higher levels of leadership agility is essential not only for top managers but for people at all organizational levels. If you want to increase your own leadership agility and help those who report to you do the same, you can start by doing two informal assessments:²

First, use the chart presented earlier to assess your own level of agility. To supplement your self-assessment, ask a few trusted colleagues to tell you where they think you are most of the time. Then ask yourself whether you want to develop to the next level. Developing increased agility will make you more effective in carrying out your everyday leadership initiatives, and it will aid you in helping others become more effective leaders. Second, use the same chart to assess your managers’ agility levels. Compare their current levels with where you think they need to be.

Developing Leadership Agility

In our experience, the best support for increasing your agility is a workshop, action learning program, or coaching relationship that focuses specifically on leadership agility. Ultimately, however, the primary “engine” for developing leadership agility is self-leadership: Start by assessing your current agility level and your strengths and limitations in the four leadership agility competencies. Then set your leadership development goals. Do you want to move to a new level of agility? Even if you don’t want to move to another level, what leadership agility competencies do you want to develop further within your current level?

Once you’ve set your leadership development goals, the key to increasing your agility is to use your everyday initiatives to experiment with more agile behaviors. At the heart of self-leadership and the other

three competencies is a practice we call “reflective action.” This is an ongoing, cyclical process of setting objectives, clarifying a strategy or plan for achieving these objectives, taking action, then reflecting on your experience. Reflective action can be very rapid and intuitive, as in the midst of a conversation, or it can be more sustained and systematic, as in developing a new business strategy.

Whatever form it takes in a particular situation, repeatedly engaging in this practice allows you to use your everyday leadership initiatives to develop all four leadership agility competencies. This is because each of these competencies involves *stepping back* from your current focus in a way that generates new insights and helps you make wiser decisions, then re-engaging in what needs to be done next:

- *Context-setting agility* is developed by stepping back and re-examining current priorities in light of the changes taking place in your larger environment.
- *Stakeholder agility* is enhanced by stepping back from your own views and objectives to consider the needs and perspectives of those who are influenced by your initiatives.
- *Creative agility* increases by stepping back from your habitual assumptions and developing optimal solutions to the often novel and complex issues you face.
- *Self-leadership agility* is developed by stepping back, reflecting on yourself, and experimenting with new and more effective behaviors.

Developing Other Leaders

There are many things you can do to help those who report to you become more effective leaders. One is to provide your managers with opportunities that will challenge them to take their next steps in developing their leadership capacities. Another is to provide effective coaching. Combining these two approaches is even more effective.

When coaching your managers, keep in mind that they will derive the greatest benefit from this process if you use your coaching interactions to help them establish their own commitment to reflective action. As the old proverb says: “If you give someone a fish, they can eat for a day. If you teach them how to fish, they can eat for a lifetime.”

In our experience, the secret to helping others develop as leaders is to model reflective action by integrating this practice into your own life: Get in the habit of taking brief reflective pauses throughout your day, particularly in the four areas we’ve identified: Am I focusing on what’s most important right now? Who else has a stake in my initiative, and how can I work with them to make it successful? What non-routine obstacles do I face, and how can I be imaginative in resolving them? What can I learn from the conversation, the day, or the project I’ve just completed?

The more you nurture a resilient, self-empowering attitude toward the challenges you face, the more your own commitment to reflective action will grow. With this practice as your ally, you’ll be able to meet the changes and complications that come your way with curiosity and optimism — and you’ll be able to help others to do the same.

References

¹ Survey of 130 senior executives and human resource professionals in Fortune 500 companies, conducted by a global career-management services firm.

² For information on the Leadership Agility 360 online assessment tool go to: www.leadershipagility360.biz

The Author

Bill Joiner is co-author of *Leadership Agility: Five Levels of Mastery for Anticipating and Initiating Change* (Jossey-Bass/Wiley). Recognized as one of the world's foremost authorities on agile leadership, he has over 30 years experience as a leadership and organization development consultant, helping companies based in the US, Canada, and Europe achieve outstanding results. Bill speaks about leadership agility, provides leadership workshops, works with executive teams, consults on organizational change initiatives, and provides action learning programs that accelerate leadership development. In partnership with Cambria Consulting, he developed the online **Leadership Agility 360**, the first feedback instrument to assess levels of leadership agility.

He has an MBA and earned his Doctorate in Organization Development from Harvard University. He served for nine years as an adjunct faculty member for Leadership for Change, a program of the Winston Center for Leadership and Ethics at Boston College. His many published articles include "Leadership for Organizational Learning," in *Transforming Leadership* (ed.) John Adams.

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