

# THE BRIGHT HUMAN SPIRIT

*Rediscovering Ancient Wisdom about Innovation*



A WHITE PAPER SERIES IN THREE PARTS:

PART I ❖ THE NEWEST PHASE OF INNOVATION

PART II ❖ MAKING MEANING

PART III ❖ PRACTICING LIFE AND INNOVATION

*by Allegra Jordan, Paresh Shah and David Dodson, 2012*

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## PART II

# MAKING MEANING

*How ancient practices help modern teams address success and significance*

In Part I, we outlined two trends that challenge all organizations:

1. *Teams must adapt to greater complexity and competition*
2. *People searching for meaning*

Innovation is one area in our lives where these two trends converge. By innovation we mean the process of becoming aware that there is a need for change and making that change happen in ways that are better, faster, and cheaper. This process provides an opportunity for teams and individuals to ask “What am I committed to becoming?”

Most teams embrace the challenge of the first trend. They excel in technical skills and have access to innovation process maps. The best teams further distinguish themselves in the second area: by helping team members make-meaning by tying innovation to larger human goals.<sup>1</sup>

We recommend seven ancient practices that foster meaning-making in a complex environment. By “making meaning” we are focused on activities that help us feel that our work is valuable and worthwhile.<sup>2</sup> These practices are concrete, mundane, and sometimes forgotten ways we foster the human spirit each day. Our goal is to help make these universal practices—many practiced by leading organizations—visible and second nature.

This white paper focuses on the first three practices for innovation: awareness, the worthy goal, and setting the foundation.

SEVEN ANCIENT PRACTICES:	Awareness	Set worthy goals	Set the foundation	Pilgrimage	Hospitality	Practice practical wisdom	Practice perseverance
THE INNOVATION PROCESS:	Become aware of the need to change	Set new goals	Establish the foundation for change	Internal idea generation	External idea generation	Evaluate ideas	Implement the idea

Innovation begins with the awareness of the need for change, a careful consideration of the goals, and by fostering an environment where risk-taking can take place. It begins far sooner than that moment in front of a white board where we brainstorm.

Our team has worked with and researched more than 250 companies and non-profits from around the world during the past 25 years. We have developed and refined perspectives on all seven practices. We recognize that practices that foster idea generation, practical wisdom, and perseverance have received significant attention and publications. While we have developed unique approaches to overcome challenges and improve return on investments for these issues, most of the inadequacies we have researched and observed in the latter phase of innovation stem from deficiency in the first three practices.

These three elements act as a force multiplier for all other parts of innovation, especially when we need to take quick, decisive action.



*The benefits of awareness radiate throughout the innovation cycle, and are also a unique unit.*

This white paper focuses on how well teams approach awareness, worthy goals, and foundations today, what firms push the boundaries, and what low-cost, ancient practices support these skills.

Awareness, the worthy goal, and setting the foundation for innovation are critical steps to getting the best out of humans. These tools are also old-fashioned life practices that integrate our work and private lives by helping us make meaning of our lives and work in the midst of massive competition and extraordinary complexity.

## MAKING MEANING

“Making meaning” means that “I generally feel that what I do in life is valuable and worthwhile.”<sup>3</sup> It is one of six elements used in determining well-being. The others are positive emotion, engagement, self-esteem, optimism, resilience, and positive relationships.<sup>4</sup>

Institutions that used to help people make meaning are eroding:

- ❖ *Until this present age, religious institutions helped people make meaning. Support for religion has eroded, though the need to make meaning still exists. Charles Taylor’s Templeton Prize winning book, The Secular Age, describes today’s world, overall, as a place where religion is optional. Marc Chaves’ prize-winning research provides detailed data to show how this trend impacts the U.S.*<sup>5</sup>
- ❖ *Robert Putnam’s Bowling Alone describes the decline of social organizations where people once connected.*<sup>6</sup>
- ❖ *The recent uprisings in the Arab world demonstrate a profound discontent with the status quo, and have made it thinkable for others to speak out against institutions (e.g. India’s corruption protests, Russian anti-government protests, etc)*

Where do people now make meaning? Spiritual institutions and civic organizations are still important. The workplace has also become important.

Some of the best work in making meaning has occurred in hospice work, where teams help a person in their last chapter of life make peace with their lives. We asked the question, that many others do, “What wait until you are dying to figure out what it all meant? Can we find peace earlier in life? How?” Our answers as they apply to innovation are found in this paper series.

## WHY ANCIENT PRACTICES?

*Select ancient practices are still credible and seek well-being for all*

It is challenging to help teams make meaning in a competitive, complex, and “always-on” climate. To do so, it is important to have all the necessary tools when working on a difficult project such as innovation. Some of these tools are old. Some seem compartmentalized – people use them for their personal or spiritual lives without realizing how they can integrate them into their professional lives. Some of these tools are ignored because they have been misused. As a result we don’t use all the innovation tools we have access to.

However, innovation requires a fresh look at what can work in today’s contexts. Some of the best, empirically grounded texts about how people make meaning are ancient. These include India’s *Upanishads* and *Bhagavad Gita*, China’s *I Ching*, Christianity’s *Bible*, *Rule of St. Benedict*, *Pastoral*

*Care*, and *Summa Theologica*; Islam's *Koran*, the Jewish *Torah*.<sup>7</sup> These sources are often more respected, cherished, and followed than the latest business study. They may also be much more of a “native language” than business jargon. (For definitions used in this paper of spirituality, innovation, etc., please see **APPENDIX 1**. **APPENDIX 2** provides the source material for traditional companies we have studied, though this work is based on in-depth research with teams organized in both for- and non-profit settings.)

We found:

***Ancient practices address root causes.*** These practices engage the root causes of “what is necessary,” and “what can go wrong,” in ways that their modern counterparts often do not fully engage or comprehend. In short, ancient practices help people unleash their spirit in practical, time-honored ways.<sup>8</sup>

***Ancient practices are not fads.*** It may be retro to engage in a thousand-year practice, but it's not faddish.

***These ancient practices affirm our well-being.*** Authors of modern techniques often say, “I offer a neutral tool.” As we know, hammers are neutral and can cause a lot of damage when used by people of ill-will (which, sadly, can mean when we use the hammer on ourselves!). Ancient wisdoms help form our character so that when we use these techniques we make more of ourselves and others. These practices promote long-term joy and life-affirming connection. When you can have a team dedicated to producing a pipeline of competitive innovation, the fact that work helps engage in a meaningful life provides a competitive edge in the talent marketplace.

When we use all tools at our disposal, including ancient ones, we can conduct better environmental scans, take steps that address the potential and problems of humans, and make better long-term decisions.

Think this is too far out there? Consider this lead story from the 2011 *Harvard Business Review*:

*“Hinduism provides a unique window into the three perspectives we focus on in this article: managing the present, selectively forgetting the past, and creating the future. The religion recognizes many gods but only three main deities: Vishnu, the god of preservation; Shiva, the god of destruction; and Brahma, the god of creation.”*

–Vijay Govindarajan & Chris Trimble, “Reinventing your business model,” *Harvard Business Review* (highlighted from the cover), Jan.-Feb. 2011, p. 114. Govindarajan was named one of the top three voices in innovation in 2011.

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*We welcome your comments, suggestions, and ideas about the material found on the following pages. To send feedback, please email Allegra Jordan: [ajordan@innovationabbey.org](mailto:ajordan@innovationabbey.org).*

## AWARENESS

*Awareness: understanding the present situation (being watchful)  
without desiring a particular outcome (being wishful).*

We can have techniques and data, but without accurately reading the situation our minds drive us to inaccurate answers and limited responses. Likewise, in our private lives, we have needs and desires, and awareness helps start the transformation of these desires and needs into elements of a profound, engaging, and fully-awake life.

Many ancient texts talk about “having eyes that don’t see,” or being “blind” to what is going on around us. Awareness practices address this human challenge.

In this section we will demonstrate how leading teams are engaging with awareness and then discuss three holistic triggers that can lead to breakthrough innovation.

**SENSING CHANGE:** We have found it helpful to start talking about awareness in very concrete terms. Consider the changing seasons. What do we notice? We sense that the air is different; perhaps the angle of the light as well. We may notice changes in animals or plants. After sensing a change in the season, communities take action. For instance, in Nepal, when the waters rise, we may be in monsoon season and need to take precautions. In the United States, when we see Christmas displays at the mall, it may be mid-October and time for Columbus Day.

Business seasons change too, and wise teams notice and respond. Sensing a change, perhaps a move by a competitor to simplify its product line, a team makes observations. Are customers demanding a simpler shopping experience, or is the competitor struggling and focusing on basic execution? Is the industry on the verge of a radical reshaping, or is one player in particular trouble? Awareness helps a team answer these questions.

*Whose job is it to be aware of what is happening and what’s about to happen?* Some teams rely on marketing and strategy departments to provide useful data and interpretation to leaders. Others rely on the rank and file to look out for the group. Unfortunately this does not insulate us from missing major trends and opportunities by failing to see them in their early stages. For instance, the president of Microsoft, Steve Ballmer, famously pronounced, “There’s no chance that the iPhone is going to get any significant market share. No chance.”<sup>9</sup>

*Why do we fail to see what’s next?* Sometimes we are too busy with the day-to-day execution of our responsibilities, or distracted by blinking lights and vibrating devices that clamor for attention. Sometimes this is due to cultures that optimize “what is working now,” an important element of innovation work from 1985-1994. Clayton Christensen’s important work in “disruptive innovation,” outlines technical solutions to this age-old dilemma.<sup>10</sup> Sometimes the problem is worse: the leader denying facts about the future. Richard Tedlow outlines 200 years of American business history where people failed to see the trends or engaged in denial about what they saw. While no one can accurately predict the future all of the time, the ancient practice of “awareness” can help us acknowledge data that is in front of us that we are not seeing.<sup>11</sup> Otherwise, we are the proverbial frog in the slowly-heating pot of water.

Awareness can tell a team when the temperature is rising, when there is still time to get out of the pot.

It starts with noticing “what is,” not “what we want to be.” This practice is often called “mindfulness,” though as you see from the table below, the practice has many names. We use the term “awareness” because the practice involves so much more than a person’s mind.

The results of greater awareness include the abilities to:

1. Sense signals our bodies and our colleagues emit around different changes (e.g. acceptance, alarm, passion, anger, despair, etc.) so we can better understand what we have to deal with.
2. See trends and patterns.
3. See the gap between stated values and those values in practice.
4. See overlooked assets around us and within us.
5. Understand better what could help our stakeholders.<sup>12</sup>

## AWARENESS IN ORGANIZATIONS

WHAT DO ANCIENT PRACTICES CALL IT?	WHAT ARE LOW COST WAYS GROUPS COULD ENGAGE IF THEY DID SO PROPERLY? <small>(i.e. yoga will not lead to insight unless practiced properly)</small>	WHAT GROUPS PUSH THE BOUNDARIES?	WHAT DO THESE GROUPS DO?
Mindfulness Contemplative prayer Meditation Being still “Watchful not wishful” Sacred texts discuss lament, laughter, beauty, hope ACTIVITIES THAT APPROACH THESE PRACTICES: Labyrinth walking Fishing Bird watching Crochet Tai chi Yoga Running Biking Hiking Gardening	<ol style="list-style-type: none"> <li>1. Breaks</li> <li>2. Vacation</li> <li>3. Offsites</li> <li>4. Stress-reduction training</li> <li>5. Laughing together</li> <li>6. Reflecting on failures</li> <li>7. Reflecting on hopeful developments</li> <li>8. Prayer rooms</li> <li>9. Subsidized yoga classes</li> <li>10. Subsidized gym time</li> <li>11. E-mail reduction</li> <li>12. Shorter e-mails so people have more time to think and less to read</li> <li>13. Proximity to walking paths</li> <li>14. Parental leave</li> </ol>	Intel Apple Infosys Oprah Google US Military Zappos SAS Walt Disney Corporation Starbucks Whole Foods Honda 3M	<ol style="list-style-type: none"> <li>1. Resilience training</li> <li>2. “No e-mail Friday” experiments</li> <li>3. Sabbaticals</li> <li>4. Optional “mindfulness” training</li> <li>5. Elevation of beauty as a goal</li> <li>6. Mindfulness laboratories</li> <li>7. Incorporating “fun,” and “laughter” into core values</li> <li>8. Inviting responsibility for innovation from all team members</li> </ol>

To be clear, any team can have yoga mats and not have any impact on their ability to be aware. We must actually want to be aware, especially leaders. Leadership must be open-minded and authentic or the leaders will shut people down without even knowing it.

How do we begin? Thich Nhat Hanh writes for secular, Buddhist, and Christian audiences. In the book *The Miracle of Mindfulness*, he describes the process as beginning with focus on a neutral action like the washing of dishes, the eating of a tangerine or the awareness of your breathing. In this state, neutrally observe what thoughts come to mind as you focus on one thing. Watch, don't wish. "I am thinking a negative thought." "I am thinking a joyful thought." "My heart hurts when this thought comes in." "My chest relaxes when this thought enters." This is a basic practice. It helps a person relax and begin to notice what is going on.

Here are some practical, low cost ways for a group to become engaged in awareness:

1. *Embrace and model proper behaviors to foster awareness:*
  - a. Listen
  - b. Reduce e-mails
  - c. Respect vacation
  - d. Walking meetings
2. *Block time in your calendar for reflection on the things you have observed – and ask questions like:*
  - a. What did my mind wander to when it was wandering? Is there a thought pattern I need to address?
  - b. Who did I interact with?
  - c. What were they excited about? Concerned about? Angry about?
  - d. What is going on (with a project, with a team, with a competitor, or supplier, or customer?)
  - e. What are the opportunities and threats that I see from these observations?
  - f. If I take lessons in sports or music, does my coach repeatedly ask me to address an "inner game" issue: finishing a swing or project, being over/under confident, etc. That can be a clue to deeper challenges that need to be addressed with self-compassion.
3. *Clear the air.* Address toxic behaviors that kill innovation: unresolved disputes, disrespect, neglect, confusion.<sup>13</sup> When we are inflamed by our own team members' injustice, anger, or personal shame, it's harder for us to invent the future together.
4. *Discuss the latest research about the value of mindfulness for teams:*
  - a. As a team watch this interview about the value of "quiet": <http://www.forbes.com/sites/jennagoudreau/2012/01/30/quiet-revolution-of-the-50-percent-introverts-susan-cain/>
  - b. Go to Youtube.com and search for "Mindfulness at Google" with Jonathan Kabat-Zinn. Ask people for their reflections on this practice.
5. *Innovate on making time for "awareness."* Hold a brainstorming session to free up time so that people's brains can work the way they are meant to work – some active time and some passive time when your brain can "connect the dots" by itself. Implement the best practices.
6. *Review ancient awareness triggers of lament, laughter, beauty and hope and see where they may or may not apply within your context.*

## THE DARK SIDE OF ACCEPTANCE

“Accepting what is” is an important spiritual practice in assessing reality, avoiding greed, envy, or “wishing” things were a certain way.

Fatalism is the dark side of the virtue of acceptance. When “acceptance” is imprudently applied, teams do not prepare adequately for challenges they are capable of meeting. In countries where we are working today, people are literally dying today from “acceptance” of conditions that they have the ability to change through prudent measures that foster health and hope.<sup>14</sup> Why is this?

1. A belief that “the way things are” is “the way things have to be.”
2. Clinging to past ways of doing things that are now harmful.
3. Missing the signals that things can be different.
4. The problem is too new to be understood.

## CASE STUDY: EFFECTIVE AWARENESS

**RAY BARFIELD, M.D.**

**REFLECTION:** Consider a time you were invited into a situation and asked to help make it better.

1. *How were you able to make sense of the situation?*
2. *How long did it take to make sense of what was going on?*
3. *Did everyone have the same awareness of the issues?*
4. *How did people respond to your leadership at the beginning, middle, and end of your situation?*

Now, read the case study, and compare your approach with that used in the case. What is different? What is the same?

### “What is going on?”

At the Duke University Medical System, Ray Barfield serves as an oncologist and leads its pediatric palliative practice. He is the perfect pediatric doctor: medium height, dark curly hair (unless it’s shaved in honor of one of his cancer patients), and eyes that alter between serious and twinkling. He rarely wears the priestly white jacket of the doctor, opting for a black mock turtleneck and jeans.

Ray’s insight into what makes palliative care different from regular chronic illness care permeates our work in innovation. The most direct link between the two fields is that in dying, as in creating, we cannot get around the human factor. We have to engage humans as full people, not just processes, chemicals, and machines. To do that, we must be fully human as well.

Ray’s work often starts in a highly-charged emotional room with his assessment of the situation. His situation is not technically different from how innovation begins: the assessment of a situation. And yet asking the simple question, “What is going on?” uncovers human emotional matters of identity, values, and fear.

Ray has one shot to get this right, and it matters. He has worked to be prepared for this conversation for many years. It's when he must help a child and their families acknowledge "what is going on" and find the best path forward.

Here is how he describes it:

*There's a time when the body begins to actively die. The patient may or may not be willing to acknowledge this is happening. They also may be unaware. Because families do not understand that the child is in the last days of life, they scour the country for a new clinical trial. The child may be insisting on this too. Sometimes, no one can convince the group to do anything else.*

*The child then goes far away, without the comfort of their toys, pets, grandparents, and friends. The flight is painful. He or she dies in a hospital hundreds if not thousands of miles from where they would have had a chance of having peace of mind. You then have to get on a plane with the body of your child and fly back home. This is painful beyond measure. A few years later the parent asks, 'Why did we do this?'*

*'The conversation' is my equivalent of brain surgery. Here is why. When a brain surgeon opens up a brain, you must deal with the brain you are presented with. Not with the brain you wish you were looking. The vessels and tissues are where they are.*

*This requires humility as you must throw out your own wishes about what could be and quickly and fully accept what is. You must have courage, moving towards the best solution for this particular brain because this is meaningful work. You must be wise, using your many years of skill to do your very best for this particular brain. You must be patient, but not too patient. This tender tissue has its own time for healing, but there is not that much time. And you need to accept the limits of what you can do for the brain given what is.*

*I walk into rooms where people are busy making plans for days an experienced doctor can see they are not going to have. It doesn't matter what I wish to be true, what is true is that they have not accepted this yet. I know there can be meaning and beauty in these last days, if they accept their new reality. But they do not see and know what I see and know. So I must bring humility, courage, wisdom, patience into the room and figure out 'what is going on?' and deal with what I have before me. I then attempt to move the patient from using their precious energy on solutions that hurt and try to get them to a place where their final moments will cure and heal them with peace.<sup>15</sup>*

Ray makes sure the child is as comfortable as possible. He asks the child's permission to discuss these issues. He is often asked about the particular drug being considered. He defers, focusing instead on the more mundane elements of the child's life: the hospital schedule, how it feels to ride to and from the hospital (if that ride is miserable, think about a plane flight or longer trip). He asks them about what family, friends, or pets they have. What does the child value?

What are the pivot points in each conversation? They vary. It's an improvisation designed to see whether a dying child is willing to talk about terrifying questions: How long? What is my body doing right now? What more do I have to endure?

What is success? When Ray recently kissed the forehead of a child, knowing it was the last time he would see her, she said, "Why couldn't you have been my doctor all along?"

*Why couldn't you have been my doctor all along?* What a world that a child would say this about her palliative care doctor. But this is the power of being liberated from living in a narrative that just wasn't working. This child got to experience a new "in the beginning," in her last few hours of life.

## THREE AWARENESS TRIGGERS

*Awareness starts with neutral observation that may lead to action.*

*This section describes three types of awarenesses that trigger innovation: **Laughter, Lament, Beauty & Hope.***

### AWARENESS TRIGGER I: LAUGHTER

*Create Fun and a Little Weirdness*

– ZAPPOS FAMILY CORE VALUE #3<sup>16</sup>



*When we are fully engaged, we connect with, laugh with, and uplift the lives of our customers—even if just for a few moments. Sure, it starts with the promise of a perfectly made beverage, but our work goes far beyond that. It’s really about human connection.<sup>17</sup>*

– STARBUCKS MISSION STATEMENT



*From frowning saints, Good Lord, deliver us.*

– ST. TERESA OF AVILA

**L**aughter interrupts us and creates spaces that invite us to think differently, as well as to connect with others. When we laugh we can become aware of:

1. A new way of thinking about ourselves and our tasks,
2. A connection to other people: who can resist sharing a joke?,
3. New power dynamics: we have the ability to change context even though we have little power,
4. An improved ability to cope with difficult facts, and
5. Our bodies as we engage in the physical act of laughing.

To illustrate, here are funny stories about six fabled innovators:

#### 1. *Charles Revson’s innovative pricing model*

During the Great Depression (1932), Charles Revson launched a cosmetics company that sold lipsticks at a much higher price than its competition. According to historian Richard Tedlow, “Revson said, ‘In the factory we make cosmetics; in the drugstore we sell hope.’ Hope apparently has a high markup.”<sup>18</sup>

**REFLECTION:** *What is the root value of what product/service you hope to provide? When is that value most needed: in good times or in bad?*

#### 2. *Jay Gould and Cornelius Vanderbilt*

Railroad giants Jay Gould and Cornelius Vanderbilt were fighting for control of the railroad industry when a bid came up from cattle owners to ship beef from the mid-west

to the North east. Gould and Vanderbilt bid against each other, each bidding lower and lower. Finally Vanderbilt gave an astonishingly low bid. Gould let him win and bought every cow he could in the Midwest. He shipped them on Vanderbilt’s rails to the North-east. Gould made a fortune on beef.<sup>19</sup>

**REFLECTION:** *Who is the winner in this story? Why?*

**3. Steve Jobs and Bill Gates from Malcolm Gladwell’s “The Tweaker”<sup>20</sup>**

“When Microsoft came out with Windows (it used the same graphical user interface), Jobs was outraged and summoned Gates from Seattle to Apple’s Silicon Valley headquarters. “They met in Jobs’s conference room, where Gates found himself surrounded by ten Apple employees who were eager to watch their boss assail him,” Walter Isaacson, Job’s biographer writes. “Jobs didn’t disappoint his troops. ‘You’re ripping us off!’ he shouted. ‘I trusted you, and now you’re stealing from us!’ ”

Gates looked back at Jobs calmly. Everyone knew where the windows and the icons came from. “Well, Steve,” Gates responded. “I think there’s more than one way of looking at it. I think it’s more like we both had this rich neighbor named Xerox and I broke into his house to steal the TV set and found out that you had already stolen it.”

**REFLECTION:** *What is your ethical bottom line in innovation? Is there a difference between human ethics and business ethics? Why?*

**4. Explaining ancient economic planning to faith-based groups. This chart is based on a sacred text where Abraham’s great-grandson Joseph interprets Pharoah’s dream about cows.**

		
<b>Egyptian Grain Income Statement</b>	<b>Years 1 -7</b>	<b>Years 8 - 14</b>
<b>GRAIN INCOME</b>		
Tax income (non-cash grain)	↑	↓
Sales (silver, land, slaves)		↑↑↑
Net	↑	↑↑↑
<b>GRAIN EXPENSES</b>		
Granary building/records	↑	↓
Housing Joseph’s family	↑	↑↑
Net Income (loss)	[↓]	↑↑↑

} **GREAT ECONOMIC PLANNING!**

SOURCE: ALLEGRA JORDAN

How can we innovate if we don’t take time to consider things from different vantage points? What breaks down our defenses more easily than laughter?

Spiritual wisdom seeks to help a person have a calm sense of joy, even when going through terrible crises. Laughter can come from joy and sense of play, promoting generosity, courage, and a sense of well-being.<sup>21</sup> Buddhists even teach that when we half-smile, it relaxes our faces and reminds us not to take ourselves too seriously. This laughter frees our energy for innovation. It's a cleansing laughter.

Satire is wonderful for innovation. It's designed to show what is ridiculous in a way that's memorable without being bitter. For example, Microsoft's own marketing team anonymously created the video "What if Microsoft Created the iPod?"<sup>22</sup> Satire is hard to pull off as humor and not "preaching," but when it works, it can open hearts and change minds.

There is a dark side of laughter that is not helpful. Flippancy and sarcasm come from a source of bitterness and pain. It's worth listening to the signal and thinking, "This person is digesting pain and emitting it to our group as sarcasm or flippancy," but allowing toxic pain into creative conversations can be an immediate, direct innovation killer.

Our advice: remember to find something to laugh about, especially in the dark times. The best humans have.<sup>23</sup> Find the many reasons to laugh, including the *hilaritas* of being so certain about our future.

## AWARENESS TRIGGER 2: LAMENT

*It was awful tasting medicine, but I guess the patient needed it.  
Sometimes life hits you in the head with a brick.*

– STEVE JOBS, APPLE COMPUTER



*We learn from our successes and failures.*

– PROCTER & GAMBLE CORE PRINCIPLES<sup>24</sup>



*Are we striving relentlessly to improve what we do and how we do it?*

– CHARLES SCHWAB

**L**ament is a grieving process and often involves silence, frustration, and tears. Not all innovation triggers are painful, but this one is. It is a process of re-establishing your identity in the face of a new future.

In lament we become aware of the new situation, we name it, we grieve for what is lost, we remember what is profoundly right, and we identify what absolutely matters to us to move forward.

Here is a deeply personal, famous corporate example from Apple founder Steve Jobs:

*I didn't see it then, but it turned out that getting fired from Apple was the best thing that could have ever happened to me. The heaviness of being successful was replaced by the lightness of being a beginner again, less sure about everything. It freed me to enter one of*

*the most creative periods of my life . . . I'm pretty sure none of this would have happened if I hadn't been fired from Apple. It was awful tasting medicine, but I guess the patient needed it. Sometimes life hits you in the head with a brick. Don't lose faith. I'm convinced that the only thing that kept me going was that I loved what I did.*<sup>25</sup>

“Days of lament” are an old-fashioned practice where people name the problem, name the pain that it caused and they see where it takes them. To be clear, a day is often not enough. Figuring out what is most important to you may take weeks or months or years. And it can lead to breakthrough innovation as it did for Steve Jobs.

In the corporate space, consider lament as a way to regroup and learn lessons from a failed project. Rather than identifying scapegoats, have the team come together to assess the project from beginning to end, and identify the underlying reasons for the failure. Then take steps to address the underlying reasons to avoid making the same mistakes in the future.

Here are three meaning-making practices that allow for people to reflect from different parts of the world:

1. **Medical culture:** “Mortality and morbidity conferences” are held to discuss what people have learned from a particular case. There are many benefits to having a public case discussion to debrief “what went wrong,” including education, accountability, and error reduction.

2. **In Japan:** A “ba” is a space for creating new meaning in Japan used by companies like Honda. The ba allows executives to go to an offsite to discuss frustrations and have honest discussion. Teams often make an inductive leap, “overcoming their personal issues and arriving at a team-based view about how to solve a problem.”<sup>26</sup>

3. **In East Africa:** In the wake of genocide, communities practice remembering rightly in public ceremonies, in a “bitter root” ceremony. After discussing what happened, one side drinks bitter water because their actions have caused pain. The other side drinks to acknowledge that they are giving up their anger and identity as a victim, and this is bitter and painful too.<sup>27</sup>

The process looks like this:

1. **Assemble affected community members.**
2. **Review and affirm shared goals.** Without a shared goal that transcends individual interests, the situation can deteriorate quickly.
3. **Remind the team to have self-compassion, and that pain is not a competition.**

Self-compassion helps us notice our own suffering, offers self-care and self-comfort in the face of suffering, and helps us remember that imperfection is part of the human experience.<sup>28</sup> Self-compassion helps us create a calm environment where we can allow for the possibility that we can improve and provides the emotional basis for improvement.

Regarding pain, we often think at these sessions, “Well, I didn’t have it as bad as you, so I shouldn’t be impacted by my pain.”

We talked with one of the most famous former child slaves in Africa after she testified before the United Nations on the horrors of international trafficking of children that she herself experienced. (She had been kidnapped and had experienced untold horrors for eight years as she was force-marched barefoot through the jungle and bush between Uganda and South Sudan.) This child, who had borne more than most in the world, said, “Pain is not a competition. You will learn from yours as I did from mine.” We must all learn from our situations, even when we do not face the same struggles others do.

4. ***Ask people to privately contemplate what went wrong.*** Here are questions modified from work with great reconciliation leaders in the U.S., Africa, Europe, and Asia by the Duke Center for Reconciliation:

- ❖ Why did the project fail?
- ❖ What mistakes did I make?
- ❖ Where could I have asked for more information?
- ❖ What else could I have done?
- ❖ What stories of violence (emotional or physical) have you have experienced, especially by those of your own “tribe?”
- ❖ What healed you the most? What was your point of greatest pain?
- ❖ Is your pain part of a wider story? Give concrete, factual examples.
- ❖ What sacred or secular texts connect you with a larger, more ancient story of similar madness, sadness, or brokenness?
- ❖ What songs, dances, or art address this real, named issue?
- ❖ How did you get into this place?
- ❖ When were you able to see the problems? When were you blind to them?
- ❖ When were you a victim? When were you a perpetrator?
- ❖ Where do you see pain today?
- ❖ Where do you see hope?
- ❖ Who embodies this hope?
- ❖ What experiments can interrupt cycles of violence with cycles of peace?
- ❖ What can you do every day to give a new cycle of peace “oxygen”?
- ❖ *In all things be concrete and realistic.*<sup>29</sup>

5. ***Let each side speak for a period of time.*** It takes time.

6. ***Complete a culturally accepted ritual of cleansing and restoration.*** This could be a project wake where you literally bury the project, give it a eulogy, and then have a drink; executives shake hands; writing and reciting a comic poem about what just happened to be recited at a local bar; karaoke; or something that is native to that group.

When we remember clearly and complete our grieving, we have energy to see the new data in ways that reflect more reality, and pursue these solutions with more professional distance, clarity and greater possibility. In our own experience we have seen the practice of lament powerfully transform

a riot-torn Kenya in 2008, where the practice helped preserved the country from spiraling into genocide.<sup>30</sup> The process has similarly impacted the immigration reform landscape in Houston.<sup>31</sup>

Lament leads to awareness because it is a sometimes somber, often more realistic analysis of why something failed with accuracy. Pinpointing the source of failure correctly and accurately helps ensure those mistakes will not be made again. Further the energy, focus, and passion that emerge from lament can have lasting impact in a way that little else can. And this is why we believe in innovation done rightly. It fails a lot of times. Most people don't care enough to do this tough emotional work. But when we respond to lament honestly, and nakedly, the world can be made new in ways we thought impossible.

### REMEMBERING “RIGHTLY” FOR GOOD HEALTH

None of us is wholly free from the past that has helped form us. Remembering this past correctly requires great care, and can lead to important innovation. The ramifications of “remembering correctly” and completing the grieving process have re-shaped our world since 1995, when South African leaders formed their Truth and Reconciliation Commissions. Its purpose: “a commission is a necessary exercise to enable South Africans to come to terms with their past on a morally accepted basis and to advance the cause of reconciliation.”<sup>32</sup> The cultural impact of this social tsunami has been felt around the world.

We would like to focus on the health aspect of memory. Our minds are not the only sources of memory. Our bodies retain stress caused by work decisions. “An enormous body of epidemiological research shows that management’s decisions contribute to mortality and morbidity at least as much as, if not more than, an employees’ own actions,” writes Stanford professor Jeffrey Pfeffer in a 2011 *Harvard Business Review*.<sup>33</sup> Having conducted hundreds of interviews across four continents, we have heard privately about scores of young executives seeing cardiologists to deal with the hidden stress of work. These heart health reports lay bare the fact that many executives suffer in silence from the pace of change and poor management decisions. If not properly addressed, this suffering will limit what excellent and talented people can contribute to a team.

Remembering “rightly” (without creating stories of catastrophes, villains, or minimizing the impact of what happened) allows us to properly finish a grieving process. Physically, the process can lead to lowered blood pressure and heart rate, reduced depression, anxiety, and anger.<sup>34</sup>

## AWARENESS TRIGGER 3: BEAUTY &amp; HOPE

*At The Walt Disney Company, entertainment is about hope, aspiration and positive outcomes.<sup>35</sup>*



*We're getting rid of over 60 different privacy policies across Google and replacing them with one that's a lot shorter and easier to read. Our new policy covers multiple products and features, reflecting our desire to create one beautifully simple and intuitive experience across Google.*

– GOOGLE E-MAIL TO USERS, JAN. 28, 2012

Awareness is about being watchful, not wishful. When we collect examples of hope or beauty, we are building a unique set of data points that help us innovate in the future. We become aware of what is possible and inspiring. But these awareness triggers do much more than just give us potential “best practices.”

When we are aware of hope and beauty, we appreciate the ways those examples refresh us and reduce trauma. This awareness has an immediate payoff, while its innovation value may be useful many months or years from now.

Here are questions emerging from ancient practices of seeking hope and beauty that help innovators become aware of different solutions to current problems:

- ❖ What does this hope or beauty look like?
- ❖ What is the ultimate promise of hope or beauty? (e.g. better lives, stronger communities, etc.) Do you respect those values?
- ❖ Do those values belong in this project?

In innovation, collecting stories of hope and beauty can begin with a scan of “best practices” that inspire us. Here are three:

1. **Infosys.** Infosys is a software solutions provider for large corporations. Infosys’ founders set as its goal to be the most respected company in India, a country beset by corruption. During the course of 30 years, the company went from a \$250 loan to a \$6.28 billion in 2011 revenue, without paying bribes.

Stated its co-founder, N. R. Narayana Murthy, *“In February 1984, Infosys decided to import a super minicomputer. . . . When the machine landed at Bangalore Airport, the local customs official refused to clear it unless we “took care of him,” the Indian euphemism for demanding a bribe. . . . /My only question was, “What is the alternative to paying a bribe?”/Our alternative: /pay a customs duty of 135% . . . We didn’t have enough money to pay the duty and had to borrow it. However, because we had decided to do business ethically, we didn’t have a choice.”<sup>36</sup>*

2. **The Apple retail store.** It’s become a source of inspiration for many other organizations. JC Penney, a large clothing store, is remodeling its stores to be simpler and more customer-friendly. The Apple store is also the inspiration for a television show,

*The Office*, which featured a plot line about Dunder-Mifflin opening a retail store. (We also recognize Apple's complex reality. Due to Apple's struggle with working conditions in its Chinese supplier plant and its wealth concentration with top executives, some customers and news publications are challenging the organization to be excellent in everything, including fairness, transparency, and accountability.)

3. ***Maison Shalom***. In the wake of Burundian genocide, Marguerite Barankitse, a former teacher who was forced to watch a horrific genocide, decided to show people a different way to live. She built Maison Shalom, *house of peace*, for war orphans and child soldiers to show them a different way to live. She has now impacted the lives of 30,000 people and has built one of the cleanest hospitals in Africa in Ruyigi, Burundi. In 2008 she was named the Faith-Based Social Entrepreneur of the Year and awarded the \$1 million Opus Prize.<sup>37</sup>

Two cautions about “best practices”:

1. ***Sometimes these limit our creativity***. If we look at the same examples of “how it’s done,” we have nearly identical database of examples to draw from. We will inevitably come up with similar offerings to each other rather than fresh new offerings.
2. ***These examples should help us see new potential, not confirm closed-minded biases***. The data is important, but so is our attitude.

When we practice awareness of hope and beauty, we think every day about things that help give us clarity and inspiration. Here are some things that we like to do:

- ❖ Admire the designs of wrapping paper
- ❖ Have a quiet meal with a few friends
- ❖ See the first daffodils in the garden
- ❖ See families bicycle around Versailles
- ❖ See the colors at the Taj Mahal at sunrise
- ❖ Watch a TED talk with family members
- ❖ Read a biography of a person who overcame adversity
- ❖ Watch the impact of the wind and sun on a puddle of water

These things create our own unique databases. When may they be useful? Every moment we can sit with their beauty and inspiration they help us re-center and see things can be beautiful. They may also help us solve a problem far into the future, as Steve Jobs did when he applied his love of calligraphy to computer font design.

What, in addition to a life well-lived, is useful in this? We believe the practice strengthens our confidence and judgment and may lead to innovation insight. But, as Jobs said, “You can’t connect the dots looking forward; you can only connect them looking backward.”<sup>38</sup>

***Beauty***. Since the time of the ancient Greeks, beauty was one of the ultimate standards, and it was tied to truth and goodness. Beauty provoked deep pleasure or intense satisfaction by providing something you could sense, or qualities you could observe, or important meaning.

While beauty can serve a guiding innovation principle, it is also a great interrupter, and healer. When we become aware of true beauty, we often don't want to live in a world without it. It changes the trajectory of our thoughts.

Not all beauty is helpful. It can charm, divert us, and lead us to making less of ourselves. This is especially true when a team member is struggling with his or her identity. When identity is not rooted in something deep but in an attribute—like beauty—or a physical thing (the problem of greed), challenges arise for the individual and for the community. (More on this in the next section, the Worthy Goal.)

But in its best sense, beauty is admirable and powerful because it gives us an invitation to see things differently. Organizations seek to engage beauty in different ways: beautiful physical spaces, ethereal music, and even wrestling with the absence of beauty to help identify ways the world can be different. There is also beauty in the process, especially when we see a defeated team figure out what is wrong and fix it. Says one of the leading people in the field of labor law, Julius Getman, “One of the reasons I like working with laborers is seeing rank and file people understand that they have more power than they ever realized. I find great beauty in seeing a person who has never made a speech talk publicly for the first time about something they really care about.”<sup>40</sup>

Invitations to beauty can be quite different than what we expect. Beauty can overwhelm us. It also can emerge slowly, as our eyes adjust to a new way of seeing. Being aware of beauty, seeking it out, letting it inspire us, is a key trigger for awareness and potentially for innovation, as is “hope hunting.”

***Stress test for hope & beauty examples:*** The right kind of hope and beauty matter. For instance, economic elegance has its place. But if it's embodied in something like slavery, where humans are considered low-cost economic inputs, that elegant solution destroys organizations and communities. If hope is seen as following a shaman who suggests women be burned as witches, as recently happened in Ghana and Nepal, the values on which that hope is based are devastating.<sup>39</sup> If beauty is based in a concept that the temporary can be made permanent (e.g. youth), this is not beauty that makes more of our community over the long haul as it roots people's identity in something that can be appreciated in the moment but can't last.

## CASE STUDY: MAKING ROOM FOR HOPE

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**SEAMUS HEANEY, as told to the authors by Malcolm Guite, U. Cambridge**

**REFLECTION:** Think of a time that you overcame a self-imposed work-related limitation.

1. *What was your self-imposed limitation?*
2. *What was the payoff you received by staying with this self-imposed limitation?*
3. *What helped you realize that these limits were self-imposed?*
4. *What action did you take?*
5. *What has been the payoff for saying “yes” to this new future?*

***“The murderous as well as the marvelous”***

**H**ope can help individuals and teams overcome self-limiting behavior. This case study illustrates the importance of being aware of hope, even in the most difficult circumstances.

Seamus Heaney is an Irish poet, and was caught up in the painful vestiges of the centuries-long war between Protestant and Catholic in Ireland. The duration and ferocity of this cycle of violence has caused many good people to lose hope. And it was in this toxic environment that Heaney began to write poetry.

Heaney's poetry wasn't good when he started. He had no reason to ever believe he would ever win the Nobel Prize for literature.<sup>41</sup>

Heaney was forced to leave his home due to civil strife. He knew himself enough to know he wasn't going to take sides in the fight that consumed those around him.

One rainy night in a new home, his friends told him to go outside and look at a comet. He walked out, looked up and saw he missed the comet. He felt like a failure: his poetry wasn't great; he'd been forced to leave his home; and now he'd even missed a comet. How hard could that have been? Go outside and look up at the right time. But in this he failed too.

And then it began to rain.

It was the rain that did it. He recorded it as a baptism of sorts: helping him remember his identity, what was important. He remembered he needed to look for hope, and not please people who could not be pleased.

The poem *Exposure* marks the turning point in Heaney's art, when his good became great. He saw the bigger picture, the "diamond absolutes" of who he was.

*How did I end up like this?  
I often think of my friends'  
Beautiful prismatic counselling  
And the anvil brains of some who hate me*

*. . . Rain comes down through the alders,  
Its low conductive voices  
Mutter about let-downs and erosions  
And yet each drop recalls*

*The diamond absolutes.  
I am neither internee nor informer . . .*<sup>42</sup>

Remembering in that moment "who I am," changed him. When he let go of trying to please others and just be himself, he had the energy and ability to see new things that were not all death and dying and meaninglessness. It lifted him to the elite of his profession. He still understood the awful in life, as he'd lived it. But, as Heaney himself said when accepting his Nobel Prize, his poetry got better when he learned that life offered "the murderous as well as the marvelous."

Collect hope and remember the "diamond absolutes" of who you are. They help unlock the door to a life worth living and the courage to acknowledge that things are changing and that it may be time for you and your team to change too.



These three awareness triggers stimulate our imagination if we notice them and read the signals accurately. They help us see what is going on in ways the human spirit has found helpful for thousands of years. These also that inform the next phase of innovation: setting a worthwhile goal.

## PURSUING THE WORTHY GOAL

*The worthy goal: that which makes more of all of us over the long-term; flourishing.*

*We strive to create a work environment where motivated Team Members can flourish and succeed to their highest potential.*

– WHOLE FOODS’ CORE PURPOSE STATEMENT



*Without moral purpose, competence has no measure, and trust no goal. This defining thought gives me a way to think about the place of moral purpose in our organization.*

– MAX DE PREE, FORMER CEO OF HERMAN MILLER<sup>43</sup>

Today, talented team members are asking, “What do I become by engaging in solving these tough problems?,” “Who am I committed to becoming?,” and “Why?” Our answers create our internal GPS system for ourselves and for our teams.

These are also some of life’s “Big Questions,” and are called “Big Questions,” for a reason. They touch on a person’s identity and purpose. They also help outline intentions: it does not mean that we will reach that goal but that we intend to move in a specific direction.

### WHAT IS THE WORTHY GOAL?

The ultimate goal or intention for the ancient Greeks was “flourishing.” It’s not just an ancient concept rooted in the work of Aristotle, it’s the latest in sustainable happiness research as described by Martin Seligman in his 2011 book *Flourish*.

It’s not just happiness or freedom, which can lead to short-term thinking and community degradation when abused. Flourishing involves actions that promote positive emotions, engagement, interest, meaning, purpose. It may include elements that boost self-esteem, optimism, resilience, vitality, self-determination and positive relationships.<sup>44</sup> (When “flourishing” is our ultimate goal, we account for the well-being of all stakeholders.)

Spiritual traditions, at their best, offer specific intentions that we can track our progress to. Christians are taught that “a person is made in the image of God and destined for communion with God.” That goal never changes. There is a simple statement of identity, purpose, and path. The path to the goal is also a yes/no proposition: your next action takes us closer to intimacy with a larger power or further away from it. In Islam, Hinduism, Buddhism, Taoism, and Confucianism there are similar relationships of who we are and the goals of the work we do. These connections lead to flourishing, not just survival.

## WHY ARE “WORTHY GOALS” INCORPORATED IN TODAY’S BEST BUSINESSES?

Often the worthy goal or intention is embodied in the triple-bottom line: people, planet, profit. How do we move towards that goal? Through ethical behavior that makes more of all stakeholders.

Here are innovation benefits of pursuing a worthy goal:

1. **Recruiting.** No sane, talented, whole person wants to damage their reputations by working in ways that make less of them. This means a company, no matter how brilliant in the short-term, cannot succeed in the long-term if it chooses to be excellent in everything except ethics. Trust is required to allow people to relax and share resources and ideas.
2. **Competence & commitment.** We need the whole person to show up as today’s complex problems require committed problem solvers.
3. **Efficiency & focus.** We stop never-ending debates by expressing a positive goal, outline steps to achieve that goal, and identify what people “have become” when they achieve that goal. And knowing a goal liberates. We have the confidence to say “no” to other worthy projects that are not our projects. As Tim Cook, CEO of Apple said, “We believe in saying no to thousands of projects so that we can really focus on the few that are truly important and meaningful to us.” The worthy goal liberates us from entanglements with those things and people who wish to engage with us but are not part of our wise path.
4. **Integration.** With awareness and a worthy goal, individuals can produce higher quality work, with better health, job satisfaction, and an improved image throughout the community. We are allowed to pursue life meaning within the framework of this particular challenge.
5. **Focus can lead us to make subtle but important distinctions that set us apart from our competitors.** Focus gives us time to think about what those differences may be and the bandwidth to pursue them.

*To be clear, we have ample evidence that bad behavior can make people rich.* Today in the American South, new stories of near-genocides are being discovered through investigations of the convict leasing system in place until 1945. This system was economically optimized to provide plantation and iron mine owners with a low cost labor force via the prison system. In this system, African-American men were arrested on trumped up charges and leased to work mines and cotton fields. Economically, the system provided low cost labor. For all but a few very rich people, the policy was generationally disastrous and profoundly unstable.<sup>45</sup> Most societies have similar stories.

## THE WORTHY GOAL IN ORGANIZATIONS

WHAT DO ANCIENT PRACTICES CALL IT?	HOW DO COMPANIES ALLOW FOR THIS?	WHAT GROUPS PUSH THE BOUNDARIES?	WHAT ARE EXAMPLES OF PUSHING THE BOUNDARIES?
Flourishing Drawing closer to God The path to enlightenment True North/Inner compass Developing character Ethics	1. "Triple bottom line": profit, planet, people 2. Sustainable mission focused - Serve the mission first, not the people doing the mission	Whole Foods Apple Infosys Royal DSM Southwest Airlines Broad Group Potash Corporation Unilever Herman Miller Grupo Ferrovial CREE DuPont Johnson & Johnson	1. Acknowledge multiple stakeholders in a purpose statement 2. Ask customers to sign a stakeholder manifesto 3. Use the word "flourish" 4. Tie corporate and spiritual values together 5. Consider "values" as a source of entrepreneurial differentiation 6. Unrelenting commitment to people, planet and profit

### CASE STUDY: FRAMING THE WORTHY GOAL

#### CREE LIGHTING COMPANY

What does the "worthy goal" look like? Here is an example from CREE lighting company, an energy-efficient LED bulb producing company that provided the lighting for Beijing's Olympic stadium centerpiece, the Birds Nest. This organization is seen as such an industry leader, President Obama publicly visited its North Carolina headquarters twice to honor CREE's best practices.

#### CREE'S LED LIGHTING MANIFESTO

*We declare this as our universal goal:*

To make energy-wasting, traditional lighting technologies obsolete through the use of energy-efficient, environmentally friendly LED Lighting.

*We endeavor to:*

- ❖ Reduce the damaging effects of energy inefficiency on our economies and environments
- ❖ Realize energy-efficient lighting products in every country, city and home
- ❖ Revitalize the lighting industry and release it from its century-old habits

"We are the innovators, the pioneers, the dreamers. The ones who see a bright and possible future for humanity. We are the doers, the influencers, the teachers. We are bold and persuasive in communicating the potential and the promise. We are the rebels, the nonconformists, the free spirits. We do not accept the status quo. We are LED Lighting Revolutionaries."

*We proclaim this universal declaration of LED Lighting:*

- ❖ All human beings are born into light. Created light is a fundamental and integral part of our productivity, security and artistic expression as human beings.
- ❖ Creating light consumes energy. The least expensive, most secure and cleanest energy is the energy that is not used.
- ❖ Proper quantity and quality of light are essential to human perception, performance, and enrichment of life. These should not be sacrificed in the name of energy savings.
- ❖ Poisoning our ground water, lakes, oceans and fellow humans with toxic mercury is not an acceptable price for energy-efficient lighting.
- ❖ Innovation and creativity can make efficient LED lighting affordable and available to all.

The LED Lighting Revolution will not come to life on its own; people, corporations and institutions are the LED Lighting Revolutionaries. Acting alone, working together, and leading others, we accept the mantle of stewardship of the LED Lighting Revolution.

Source: <http://www.creeledrevolution.com/join>

When we saw this at CREE headquarters, we inquired who wrote it. Was it a coincidence that the man who wrote this was Greek? The ancient Greeks taught us much about the link between light and the goal of life, flourishing.

## HOW DO WE START?

We ask teams these questions about organization and themselves. We have found, especially in Asian countries, many people have never been asked these questions, but enjoy thinking about these topics, and appreciate having the time to integrate their technical expertise with their passion and moral judgment.

1. What has the team loved about past work?
2. Who has the team loved in its past work?
3. What does the team want to create?
4. What does the team have to let go?
5. What makes the team happiest about moving on?
6. What makes the team the saddest about letting go?
7. Where are the team's best sources of energy?
8. Now imagine the team three years into the future and the team is in the flow at work:
  - a. The team is happy. Where is it?
  - b. What is the team's next step to getting there?<sup>46</sup>

In our work with clients who have a good sense of their goal, we conduct a stress-test and see how their thoughts and ideas fit with the flourishing framework:

1. What does flourishing look like to each member of the team?
2. Do these goals make more of each member of our stakeholders?
3. What do we say no to, in order to say yes?
4. What concrete actions are we taking to move in the direction of flourishing?
5. What prevents us from moving in the right direction? (This could be attachments to the past, real barriers, etc.)

Finally, in terms of preparation for an innovation process, the best team members have a good idea about these three personal questions, which help any individual make meaning.

1. *Who am I?* This is your basic identity as a human and should not be tied to identity, health, or possessions.
2. *What am I committed to become?*
3. *What are my core values?* Name two specific actions that indicate you “walk the walk” and do not just say you like these values.

## THE RESULTS

“**T**o what end?” is a question for this particular age, when we must ask more of creative selves. Why are we doing what we are doing? Will it make more of our community? Will it make more of me? Many times the actions two groups take can be identical, but their end goal leads to a divergence in what the team is willing to do and to become.

One important end of this work is fostering connection. This is a critical human need according to three recent, major studies:

1. In 2010, social scientist Brené Brown discussed at TEDxHouston her research showing that humans were hard-wired for connection.<sup>47</sup>
2. The year before, the results of a 10-year study documented the finding that loneliness is contagious were published.<sup>48</sup>
3. An impressive array of scholars at the same time published a massive international, cross-discipline study of how pain transforms us, and documented how we heal in community.<sup>49</sup>

The ultimate answer “to what end am I participating in this work?” is often “so that we may connect with others in positive ways, as humans were meant to do, and so that we make more of ourselves and others.”

## SETTING A GOOD FOUNDATION

*Competence: the ability to do what needs to be done.*

– JOHN HALL

**P**roject three months from now. The innovation project has failed to produce wins. People are tired and no one wants to hear from the innovation team leaders. What happened?

*This won't happen to us! We are smarter than that.*

Smart in what way? Success in innovation is only part intelligence, technical competence, and process. These are requirements to get in the door, forming a base from which to work. Innovation requires the transformation of people's actions and desires. It requires a good foundation before the first speech is given.



*This thirteen-story apartment building in China fell over due to poor foundations.*

## THE CHALLENGE

**I**n our enthusiasm about our new future, we have seen our clients launch initiatives with a poor understanding of the human challenges of this tough process.

What does a lack of preparation sound like?

- ❖ “This is a phase.”
- ❖ “Why are we doing this?”
- ❖ “This is going to be easy!”
- ❖ “They/I don’t understand.”
- ❖ “I was diminished and demeaned.”
- ❖ “Us” versus “them” in-fighting
- ❖ “Not yet—it’s not ready.”

How can this be? We have data and techniques! Isn’t that enough? It is not when you must make meaning while innovating.

The truth is that most innovation initiatives fail before the kickoff meeting. We will explore why.

## PREPARATION OF MEANING-MAKING IN TECHNICAL ENVIRONMENTS

Theodore Ryan is a teacher and a seasoned organizational development expert at Duke University. He teaches engineers and business students.

In his first engineering management class he shows a picture of a rocket launching and exploding. He gets to the heart of the matter: the data show that this will be the career trajectory of most engineers who have learned the technical side of their trade but never the human side.

He tells them, *“The data show the majority of engineers will be fired from their post within the first few years after graduating. Why? Because they have not made the leap from being technical leaders, which they are, to doing the job that needs to be done: getting people to work together to solve tough problems. Many have worked with equations which follow a particular logic. But now one must work with humans who challenge and change.*

*Consider the case of Iron on the periodic table. What would you do if Iron jumped off the periodic table and began to complain that it didn’t like its atomic number, and that it wasn’t going to work with Oxygen at all because of something that happened that morning in the laboratory? A team leader must enjoy this challenge, because this will happen before lunch on many days.”<sup>50</sup>*

What leaders must do is prepare for some of the most common people challenges of innovation. We cannot be that different from Dr. Ray Barfield when he goes into an emotionally charged environment where people are dying. We must look at what is and deal with that reality.

We need humility, because remember, we are not good at helping new ideas become reality.

Here are some ways that businesses and spiritual communities offer wisdom about structuring innovation initiatives:

### SETTING THE FOUNDATIONS IN ORGANIZATIONS

WHAT DO ANCIENT PRACTICES CALL IT?	HOW DO COMPANIES ALLOW FOR THIS?	WHAT GROUPS PUSH THE BOUNDARIES?	WHAT ARE EXAMPLES OF PUSHING THE BOUNDARIES?
Remembering the end goal (often through communal affirmations) Study sacred texts that honor the cycle of preservation, destruction, and creation or “making all things new.” What concrete steps did people take to change things? Discussing identity issues: ego vs. being Discussing “works” and “faith” Community standards while affirming “imago dei” Compassion Prayer journals	<ol style="list-style-type: none"> <li>1. Reviewing available process materials for innovation as found in publicly available sources such as the <i>Harvard Business Review</i>.</li> <li>2. Proper hiring and team selection: distinguish between the person’s value and what is needed to serve the team’s mission.</li> <li>3. Custom metrics for innovation projects</li> <li>4. Enforcing standards for productive conversations</li> <li>5. Reduced perfectionism: Mistakes are accepted as long as they were well-intended and people learn from them</li> </ol>	Procter & Gamble Intuit US Military Westlaw BMW General Electric DuPont 3M IDEO	<ol style="list-style-type: none"> <li>1. Resilience training</li> <li>2. Emotional intelligence training</li> <li>3. Blended teams of people working on core processes and new products.</li> <li>4. Diaries for inner life metrics to make visible the “inner game” of innovation visible</li> <li>5. Establish a corps of innovation mentors, catalysts, or volunteers.</li> </ol>

## CONFUSION ABOUT PREPARATION VERSUS CALLING

*Voca me cum benedictus*—call me to be with the blessed—is one of the most beautiful lines of Mozart’s famous *Requiem in D Minor*. It is sung in angelic tones in the midst of a frightening, rumbling song about days of fear and confusion. It is one of Mozart’s most enduring works, and in continuous play in Western society for 220 years. “*Voca*” comes from the Latin term *vocare*, meaning, “to be called.” A stress-test for a worthy calling is that it makes more of us all.

But what do you do after you understand your calling? This has caused many people confusion. In a 2010 study by Duke University of leadership challenges in American evangelical seminaries, the interviews of successful and seasoned seminary presidents consistently brought up the problem of “lack of preparation” in potential candidates for the post of seminary president. Candidates felt, “being called” was the only credential they needed in order to be given charge of a complex, multi-stakeholder firm.

This confusion is reckless for the health of institutions we care about. Perhaps the candidates were not prepared when they sensed a calling, but these candidates now have opportunities to equip themselves and should avail themselves of those opportunities.

Miracles can and do happen in innovation in all settings: business, government, and non-profit organizations. It would also be a mistake to ignore, oversimplify or skip preparation for the innovation process. When we prepare, we can change ourselves and others in productive ways. True, we can’t plan for every possible scenario. And we can also prepare. Both are true.

## A MEANING-MAKING TEAM CHARTER

In our experience, a simple team charter (please see **APPENDIX 4**) that discusses meaning-making questions goes a long way to complement known, technical innovation processes. In our team’s experience with engineers, the same exact engineers can staff two different projects, but the team with a meaning-making charter makes more progress. (*This comes as a happy revelation to many engineers who often struggle with the human side of innovation.*)

Before we start: *Clear the air.*

Unresolved disputes, in-fighting, disrespect, and narcissism create tension and divert energy from solving a problem to “watching my back.” Before starting an innovation initiative, it’s important to deal with these uncomfortable issues. When teams do not, that is a nail in coffin of the innovation initiative.<sup>51</sup>

We outline two elements of this charter:

#### A PRIVATE CHARTER

- ❖ *Who am I?* This is your basic identity as a human and should not be tied to identity, health, or possessions.
- ❖ *What am I committed to become?*
- ❖ *What are my core values?* Name two specific actions that indicate you “walk the walk” and do not just say you like these values.

#### THE TEAM CHARTER

On a separate sheet of paper write the following, which becomes the basis for a simple team charter surrounding the issues of “making meaning.”

1. *What is the mission of the group?*
2. *What are its key deliverables?*
3. *Who will the team members be?*

***Point of meaning-making confusion:*** Choosing the right team does not mean everyone is right for each job. Confusion can arise when spiritual traditions ask us to see each person as *imago dei*, the image of God. This means that everyone suffers, dreams, lives and dies just like we do. Identity does not change no matter what task is in front of the group. The question before the group is different: does this person bring the skills, drive and emotional intelligence to serve the mission? This has nothing to do with the inherent worth of a colleague.

4. *What are the team’s core values?* Give two specific actions about how the team will “walk the walk” for each core value.
5. *What are the key process agreements for “what needs to get done?” and “how we will address those challenges” given the team’s mission and core values?* There are a few ways to address important process agreements. The first could be to have a “kvetch” session where the team writes down everything that annoys its members and creates agreements about how to avoid those.

A second way would be to look at best practices of innovation and see what they do. Here are IDEO’s innovation process agreements:<sup>52</sup>

1. Encourage wild ideas
2. Build on the ideas of others
3. Stay focused on the topic
4. One conversation at a time
5. Be visual
6. Go for quantity
7. Defer judgment

Here are Google's:

1. Ideas come from everywhere
2. Share everything that you can
3. You're brilliant. We're hiring.
4. A license to pursue dreams.
5. Innovation not instant perfection.
6. Data is apolitical
7. Creativity loves constraint
8. Users not Money
9. Don't kill projects, morph them.

We are not saying your team should be Google or IDEO. The team should agree on how it will handle issues like conflict, failure, and success. When the charter is completed, make sure everyone signs on and agrees to mutually enforce it. It's a living, breathing constitution for your team. Then, after the charter is set, begin the process of laying out the work: what jobs need to be done, who will do the work, how it will be measured (custom measurements, please!). **APPENDIX 3** provides excellent state-of-the-art sources for these agreements.

## CONFRONTING THE PERFECTIONIST MINDSET

*Innovation, not instant perfection.*

– GOOGLE'S 9 PRINCIPLES OF INNOVATION



*Mistakes will be made. But if a person is essentially right, the mistakes he or she makes are not as serious in the long run as the mistakes management will make if it undertakes to tell those in authority exactly how they must do their jobs.*

– 3M FOUNDER'S BASIC RULE OF MANAGEMENT <sup>53</sup>



*Evolve immediately.*

– NIKE'S 11 MAXIMS



*Our company continually improves through unleashing the collective creativity and intelligence of all of our Team Members. . . . We keep getting better at what we do.*

– WHOLE FOODS CORE VALUES <sup>54</sup>

**O**ne important barrier in innovation work is fear of failure, a near certainty in innovation. Technical fixes for sorting through what failures are good and bad are available today, from exhortations to action to organizational safety nets. And yet, the problem persists.

What is going on? It seems virtuous to want to do something with excellence. It is. But even excellence has a dark side, especially in a time of learning and experimentation.

Meaning-making work makes more of us as we engage in particular tasks. It also helps us confront the tension between “I know what I am doing” and “things break down.” We provide three ancient practices here to accept this tension:

1. *Self-compassion.* Self-compassion is about seeing suffering in all forms including ourselves and providing human comfort when one is struggling. This allows us to calm down and be open to what can be done to thoughtfully move forward. Pixar, the world’s best animation studio, is known for its ability to be able to be thoughtfully self-critical of its work and then, based on that judgment, make the necessary changes to make its product better.<sup>55</sup>
2. *An intention to be thoughtful, not perfect.* At this point it’s helpful to know an ancient principle of Japanese spirituality that addresses imperfection. The Ensō circle is a symbol of the start of an imperfect creative act. It reminds us to start, and to accept that nothing lasts, nothing is finished, nothing is perfect. The circle looks like this:



3. *A long-term perspective on what patient growth looks like.* An important Christian prayer helps describe what our actions today look like when set against the wider framework of life. This is the famous “Prayer of assassinated Archbishop Oscar Romero” written by Ken Utener:

*It helps, now and then, to step back and take a long view.*

*The kingdom is not only beyond our efforts,  
it is even beyond our vision.*

*We accomplish in our lifetime only a tiny fraction  
of the magnificent enterprise that is God’s work.  
Nothing we do is complete, which is a way of saying  
that the kingdom always lies beyond us.*

*No statement says all that could be said.*

*No prayer fully expresses our faith.*

*No confession brings perfection.*

*No pastoral visit brings wholeness.*

*No program accomplishes the church’s mission.*

*No set of goals and objectives includes everything.*

*This is what we are about.  
We plant the seeds that one day will grow.  
We water seeds already planted,  
knowing that they hold future promise.*

*We lay foundations that will need further development.  
We provide yeast that produces far beyond our capabilities.  
We cannot do everything, and there is a sense of liberation  
in realizing that. This enables us to do something,  
and to do it very well. It may be incomplete,  
but it is a beginning, a step along the way,  
an opportunity for the Lord's grace to enter and do the rest.*

*We may never see the end results, but that is the difference  
between the master builder and the worker.*

*We are workers, not master builders; ministers, not messiahs.  
We are prophets of a future not our own.  
Amen.*

## SUMMARY

Setting the foundation for an innovation initiative has a technical side (*appropriate documentation of processes, goals, team members*) and a meaning-making side (*why am I engaging in this work?*) To make meaning we need to know who we are and who we are committed to becoming. Then we can begin moving thoughtfully towards our goal as a team.

## A CONFESSION

Part I of this series discussed the dual trends of making meaning and engaging a more complex world. Part II discussed three critical areas where the making meaning side of innovation challenges us because technical solutions—while important—are incomplete. Part III will focus on areas where technical solutions are quite robust, and that meaning-making solutions can also contribute value.

We conclude Part II with a reality check, a confession.

This confession is from one of the most influential Western management texts from the past 2,000 years, Gregory the Great's *Pastoral Care*. Written in 590 A.D., the text discusses the invisible wounds that priests could inflict on people and offered advice on how to encourage different types of people. The treatise was used by Charlemagne to help transform Europe from the Dark Ages into a place of more stability.

In the last few paragraphs of this masterful work, Gregory compared himself to a painter:

I, miserable painter that I am, have painted the portrait of an ideal man; and here I have been directing others to the shore of perfection, I, who am still tossed about on the waves of sin. But in the shipwreck of this life, sustain me, I beseech you, with the plank of your prayers, so that, as my weight is sinking me down, you may uplift me with your meritorious hand.

*What humility this great man had.*



And so, here is our confession:

*Dear friend,*

*It's hard to make meaning and deal with complexity. Just one part of the equation is a challenge. We live in a prejudiced, challenging world. Today one of our team members couldn't even get iTunes to work.*

*As humans, we all sign this same confession. But we still can help renew our world. We will not be perfect, but we will try to build a bridge to a meaningful future.*

*Help sustain us and those who seek to build helpful, hopeful communities by engaging in a meaningful life within the context of a violent and complex world.*



This ends the work of Parts I and II of the Bright Human Spirit white paper series. Part III briefly describes four ancient practices to foster innovation, that map to areas where the innovation conversation is traditionally deep and helpful. These four practices are: pilgrimage, hospitality, practicing practical wisdom, and perseverance.

SEVEN ANCIENT PRACTICES:	Awareness	Set worthy goals	Set the foundation	Pilgrimage	Hospitality	Practice practical wisdom	Practice perseverance
THE INNOVATION PROCESS:	Become aware of the need to change	Set new goals	Establish the foundation for change	Internal idea generation	External idea generation	Evaluate ideas	Implement the idea

## APPENDIX I: DEFINITIONS &amp; KEY DATA SOURCES

*The article refers to the following terms:*

**NEUROPSYCHOLOGY:** How we understand brain tissue and chemical reactions influence our creativity, thoughts and actions. The point of view of this article is that our brain plays a central role, but that we are more than our brain.

**INNOVATION:** the process of meeting a need in a creative, helpful way. We modify the process of innovation as popularized by Julian Birkinshaw & Morton Hansen and more thoroughly discussed by Clayton Christensen, Henry Chesbrough, Steven Johnson, Dorothy Leonard & Walter Swap, Vijay Govindarajan & Chris Trimble. What emerges from innovation’s process may be called invention, innovation, or optimization. There are a number of “trade” names too: disruptive innovation, open innovation, reverse innovation, etc. They all speak to specific thorny problems and potential solutions in the process of innovation.

**PROCESSES** are ways we agree to work together to achieve a particular outcome.

**SPIRITUALITY** focuses on the questions we ask ourselves, along with our responses, regarding such issues as why we exist; what our existence means; where we can find transcendence (connectedness and a sense of fullness related to being part of a greater whole); and how this sense of ourselves matures in helpful ways. “Who I am” and “Who am I committed to becoming” are important spiritual questions. In this article spirituality is inclusive and universal. It is distinct from any particular religious tradition.

**SOURCES:** This article adapts ideas that are useful to humans struggling with the multiple, often conflicting viewpoints on innovation. The article is based on a synthesis of modern innovation literature with twenty years of practical application and innovation research. It incorporates more than 200 hours of interviews with 82 corporate, spiritual, development and public health leaders in the United States, Europe, Africa, and Asia. This work is steeped in a significant neuroscience and corporate social responsibility literature review, including reviewing that core principles of the most innovative companies in the world as ranked by Fortune (2007-2011). The paper would not be possible without the mature insight of Duke University’s Theodore Ryan, Ph.D., a professor of ethics and management who worked for 30 years as an executive coach and organizational consultant. Finally, this work has been improved enormously by tennis coaches Rex Miller, Kelly Baker, and the “inner game” books of W. Timothy Gallwey. These coaches, and their philosophies of mindfulness and detachment from outcome, helped make real in short time the lessons it typically takes a lifetime to amass about improving the “inner game.”

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## APPENDIX 2: MOST INNOVATIVE COMPANIES IN THE WORLD

*About lists such as these Gary Hamel writes, “What gives? . . . Trying to rank the planet’s most creative companies is a bit like trying to rank the world’s most accomplished athletes. . . . Though always entertaining, lists of this sort are more likely to start arguments than end them.”<sup>56</sup>*

**SOURCES:** *Fortune* 2007-2011 and *Fast Company*, 1-20, 2011 at CNN.com and fastcompany.com

- |                            |                                  |
|----------------------------|----------------------------------|
| 1. Apple                   | 23. ProLogis                     |
| 2. Google                  | 24. FedEx                        |
| 3. Nike                    | 25. Genentech                    |
| 4. Amazon.com              | 26. Network Appliance            |
| 5. Charles Schwab          | 27. Starbucks                    |
| 6. 3M                      | 28. Twitter                      |
| 7. Statoil                 | 29. Facebook                     |
| 8. Exxon Mobil             | 30. Nissan                       |
| 9. Walt Disney             | 31. Groupon                      |
| 10. Whole Foods Market     | 32. Dawning Information Industry |
| 11. Goldman Sachs Group    | 33. Netflix                      |
| 12. Procter & Gamble       | 34. Zynga                        |
| 13. McDonald’s             | 35. Epocrates                    |
| 14. Intel                  | 36. Trader Joe’s                 |
| 15. UPS                    | 37. ARM                          |
| 16. FPL Group              | 38. Burberry                     |
| 17. Medco Health Solutions | 39. Kosaka Smelting and Refining |
| 18. Herman Miller          | 40. Foursquare                   |
| 19. Integrys Energy Group  | 41. ESPN                         |
| 20. Graybar Electric       | 42. Turner Sports                |
| 21. Fortune Brands         | 43. Huawei                       |
| 22. BNSF Railway           | 44. Syncardia                    |

### APPENDIX 3: EXCELLENT INNOVATION PROCESSES SOURCES

*Firms and scholars have published excellent wisdom about the technical processes of innovation. Here are some of our favorites:*

1. Vijay Govindarajan and Chris Trimble, *The Other side of Innovation: Solving the Execution Challenge*, (Harvard Business School Press: Boston), 2010.
2. Morten Hansen and Julian Birkinshaw, “The Innovation Value Chain,” *Harvard Business Review*, May 2007, pp. 121-130.
3. Peter Skarzynski and Rowan Gibson, *Innovation to the Core*, (Harvard Business School Press: Boston), 2008.
4. Theresa Amabile and Steven Kramer, “The Power of Small Wins on Creativity,” *Harvard Business Review*, May 2011, pp. 70-80.
5. Roger Martin, “The Innovation Catalysts,” *Harvard Business Review*, June 2011, pp. 82-87.
6. Bruce Brown and Scott D. Anthony, “How P&G Tripled Its Innovation Success Rate,” *Harvard Business Review*, June 2011, pp. 64-72.

APPENDIX 4

# Team Charter

**TEAM NAME:** \_\_\_\_\_

**TEAM MEMBER NAMES:** \_\_\_\_\_

**TEAM GOALS AND PURPOSE:** \_\_\_\_\_

**KEY DELIVERABLES:** \_\_\_\_\_

Our Team Process	
PROCESS ELEMENTS	OUR PROCESS AGREEMENTS
How will we set leadership and team member roles?	
How will we communicate? (email, phone, Google groups, etc.)	
Where will we meet? Who will be in charge of selecting/reserving a location?	
How will we establish meeting times?	
How will we set agendas for meetings? Who will do it?	
How will we handle unpunctuality?	
How will we ensure that all members of the team are heard?	
How will we establish deadlines? What will we do if they are not met?	
How will we keep each other accountable?	
How will we motivate/deal with a member who is not taking initiative; is doing sub-standard work; is not adhering to our Charter?	
How will we make decisions and reach consensus?	
How we will handle disagreements and conflicts?	
Possible additional process elements/agreements:	

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APPENDIX 4

# Team Charter

## Our Team Culture: *Desired values, behaviors and/or attitudes*

<b>DESIRED CULTURAL ELEMENTS</b> <i>Values, behaviors and/or attitudes</i> [ LIST AT LEAST FIVE ]	<b>BEHAVIORAL BUILDERS/INDICATORS</b> <i>How we will demonstrate each element in our actions &amp; communications</i> [ CITE AT LEAST TWO FOR EACH ELEMENT ]
1	+ ..... +
2	+ ..... +
3	+ ..... +
4	+ ..... +
5	+ ..... +

Copyright Theodore Ryan, Ph.D.

## END NOTES

- <sup>1</sup> Rosabeth Moss Kanter, “How Great Companies Think Differently,” *Harvard Business Review*, Nov. 2011, p. 68.
- <sup>2</sup> Martin E.P. Seligman, *Flourish*, (Free Press: New York), 2011, p. 27.
- <sup>3</sup> Ibid.
- <sup>4</sup> Ibid. This list comes from a study by Felicia Huppert and Timothy So and was used to measure flourishing in 23 European Union nations. (Denmark scored highest in well-being.) p. 27-28.
- <sup>5</sup> Charles Taylor, *The Secular Age*, (Belknap Press: Cambridge), 2007 (winner of the 2007 Templeton Prize) and Marc Chaves, *American Religion: Contemporary Trends*, (Princeton University: New Jersey), 2011. This work won the 2012 *Christianity Today* award.
- <sup>6</sup> Robert Putnam, *Bowling Alone*, (Simon & Schuster: New York) 2000.
- <sup>7</sup> Kaihan Krippendorf, *The Way of Innovation: Master the Five Elements of Change to Reinvent your Products, Services, and Organizations*, (Platinum Press: Avon, MA), 2008.
- <sup>8</sup> Interview with Duke management and ethics professor Theodore Ryan, Ph.D., 12/8/2011.
- <sup>9</sup> Richard Tedlow, *Denial*, (Portfolio: New York), 2010, inside jacket cover quote.
- <sup>10</sup> Importantly, no serious innovation expert would urge any team to ignore its core business. “Optimizing” in this sense means spending resources on a dying product line rather than investing in solutions that will keep a team in business for the future.
- <sup>11</sup> Awareness is often called “mindfulness.” We use the word awareness because the practice focuses on more than the mind. We also want to emphasize the right place for active “thinking,” and often intuition in the early stages is needed, a less conscious process.
- <sup>12</sup> Peter Skarzynski and Rowan Gibson, *Innovation to the Core*, (Harvard Business School Press: Boston), 2008, p. 46. These four areas are consistent sources of breakthrough innovation according to the authors.
- <sup>13</sup> Theresa Amabile and Steven Kramer, “The Power of Small Wins on Creativity,” *Harvard Business Review*, May 2011.
- <sup>14</sup> Interview with Darriel Harris, January 2012. In working in Rajef, South Sudan we find that avoidable onchocerciasis, continues to plague individuals. Often called “river blindness,” it is a painful condition that leads to blindness. It is treatable with Merck provided Ivermectin, a pharmaceutical Merck has given freely to the government and NGOs for distribution and yet it has not been delivered, nor have villagers prioritized obtaining it. <http://darrielharris.wordpress.com/2012/02/06/disease-onchocerciasis/>
- <sup>15</sup> Interview with Raymond Barfield, M.D., Ph.D., Winter 2011.
- <sup>16</sup> <http://about.zappos.com/our-unique-culture/zappos-core-values/create-fun-and-little-weirdness>
- <sup>17</sup> <http://www.starbucks.com/about-us/company-information/mission-statement>
- <sup>18</sup> Author class notes from Richard Tedlow’s Coming of Managerial Capitalism Class at Harvard Business School, 1994.
- <sup>19</sup> Ibid.
- <sup>20</sup> Malcolm Gladwell, “The Tweaker: The Real Genius of Steve Jobs,” *The New Yorker*, Nov. 14, 2011. [http://www.newyorker.com/reporting/2011/11/14/111114fa\\_fact\\_gladwell?currentPage=all](http://www.newyorker.com/reporting/2011/11/14/111114fa_fact_gladwell?currentPage=all)
- <sup>21</sup> C.S. Lewis, *The Screwtape Letters*, (Collier Books: New York), 1961, p. 50.
- <sup>22</sup> <http://www.youtube.com/watch?v=YvX3laQlg14>
- <sup>23</sup> Jeremy Begbie, “Faithful Novelty,” *Divinity Magazine* at Duke Divinity School, p. 7. Begbie writes that “Dietrich Bonhoffer . . . spoke of *hilaritas* while facing his own execution.” Also in Robert Massie, *Catherine the Great: Portrait of a Woman* (Random House: New York), 2011, p. 169. Massie describes Catherine, growing up in an emotional vacuum, finding insight and laughter through reading Voltaire, an important influence in her governing Russia. “Here was a philosopher who could teach her how to survive and laugh. And how to rule.”
- <sup>24</sup> [http://www.pg.com/en\\_US/company/purpose\\_people/pvp.shtml](http://www.pg.com/en_US/company/purpose_people/pvp.shtml)
- <sup>25</sup> <http://news.stanford.edu/news/2005/june15/jobs-061505.html>
- <sup>26</sup> Ikujiro Nonaka and Hirotaka Takeuchi, “Are you a wise leader?” *Harvard Business Review*, May 2011, p. 64.
- <sup>27</sup> Interview with U.N. Human Rights Prize winner Angelina Atyam, 2010.
- <sup>28</sup> Prof. Kristen Neff, <http://www.self-compassion.org/video-clips/self-compassion.html>
- <sup>29</sup> Modified from Emmanuel Katongole, *Identity, Community and the Gospel of Reconciliation*, Duke Center for Reconciliation, 2008.
- <sup>30</sup> Celestin Musekara, Ph.D. of ALARM (African Leadership & Reconciliation Ministries) had lived through the Rwandan genocide. This quote comes after he studied the lament process as taught by Prof. Emmanuel Katongole at the Duke Center for Reconciliation in January 2008, He said it assisted him in the 2008 Kenyan riots.
- “ . . . I was very encouraged by the courage, determination, and commitment to healing, forgiveness, and reconciliation by the Kenyan church leaders. As I mentioned to them, if the Rwandan church leaders had come together like the Kenyans in the beginning of the war in 1990, Rwanda would have not experienced the genocide four years after the

tribal war began. The Church leaders in Kenya have the opportunities to be instruments and agents of healing, forgiveness, and reconciliation at this crucial time in the history of the nation of Kenya.”

These are not idle words. This is a person who lived through the murder of roughly one million people. These are the words of a person who has seen innovation after innovation fail, and found a solution through mindful lament.

<sup>31</sup>At a diverse reconciliation leaders gathering in the United States in May 2008 led by the Duke Center for Reconciliation, an influential African-American pastor, Harvey Clemmons, from Houston had frank words for a Latino minister. Many Latino immigrants in the country were breaking the law and putting their lives and the lives of others at risk. They were taking jobs from Americans. The Latino minister challenged back that Latinos were moving north to better their lives like African-Americans had: that it was the same journey, only a few decades apart. The African-American minister did not back down. Instead they took it out into Duke Gardens to continue their heated debate. Sitting with a common religious “brotherhood,” the African-American minister had a change of heart. Clemmons went back to Houston and advocated for immigration reform. Within 90 days he and a team of leading clergy, corporate leaders, and social activists recruited more than 1,000 churches to join him, and the Houston Coalition for Immigration was born.

<sup>32</sup><http://www.justice.gov.za/trc/>.

<sup>33</sup>Jeffrey Pfeffer, “Could we manage not to damage people’s health?” *Harvard Business Review*, Nov. 2011, p. 42.

<sup>34</sup><http://www.mayoclinic.com/health/forgiveness/MH00131>.

<sup>35</sup><http://disneycareers.com/en/working-here/culture-diversity/>

<sup>36</sup>Anand P. Raman, “Why Don’t We Try to Be India’s Most Respected Company?” An Interview with N.R. Narayana Murthy, *Harvard Business Review*, Nov. 2011, p. 80.

<sup>37</sup>[http://www.opusprize.org/winners/08\\_Barankitse.cfm](http://www.opusprize.org/winners/08_Barankitse.cfm)

<sup>38</sup>Steve Jobs, Stanford Commencement Address, 2005. <http://news.stanford.edu/news/2005/june15/jobs-061505.html>.

<sup>39</sup>Manesh Shethra, “Nepalese woman called a witch, burned alive,” CNN.com, Feb. 18, 2012. [http://www.cnn.com/2012/02/18/world/asia/nepal-witchcraft-burning/index.html?hpt=hp\\_t3](http://www.cnn.com/2012/02/18/world/asia/nepal-witchcraft-burning/index.html?hpt=hp_t3)

<sup>40</sup>Interview with Julius Getman, 2008. Getman grew up in the 1930s in the Bronx, raised by parents in the garment industry. His aunt was in the famous Triangle Factory fire.

In addition to working with unions, such as the police union and the service workers’ unions, Getman has taught labor law at Harvard, Chicago, Stanford, Yale, and is currently at the University of Texas.

<sup>41</sup>Thanks to Rev. Malcolm Guite of U. Cambridge for this example.

<sup>42</sup>Seamus Heaney, *Opened Ground: Selected Poems 1966-1996*, (Farrar, Straus and Giroux: New York), 1998, pp. 135-136, 423.

<sup>43</sup><http://michelehunt.blogspot.com/2011/04/herman-miller-inc-my-camelot-experience.html>

<sup>44</sup>Martin Seligman, *Flourish: A visionary new understanding of happiness and well-being*, (Free Press: New York), 2011, p. 27.

<sup>45</sup>Douglas Blackmon, *Slavery by Another Name* (Doubleday Books: New York), 2008. This work won the Pulitzer Prize.

<sup>46</sup>These last two questions are adapted from Timothy Butler, *Getting Unstuck*, (Harvard Business School Press: Boston), 2007.

<sup>47</sup>Brene Brown, *The Power of Vulnerability*, [http://www.ted.com/talks/brene\\_brown\\_on\\_vulnerability.html](http://www.ted.com/talks/brene_brown_on_vulnerability.html)

<sup>48</sup>John Cacioppo, James Fowler, and Nicholas Christakis, *Alone in the Crowd: The Structure and Spread of Loneliness in a Large Social Network*, [http://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=1319108](http://papers.ssrn.com/sol3/papers.cfm?abstract_id=1319108).

<sup>49</sup>Rita Charon, “Meditations on Pain,” *The Lancet*, Volume 373, Issue 9670, pp. 1163 - 1164, 4 April 2009. [http://www.thelancet.com/journals/lancet/article/PIIS0140-6736\(09\)60668-1/fulltext](http://www.thelancet.com/journals/lancet/article/PIIS0140-6736(09)60668-1/fulltext)

<sup>50</sup>Interview with Theodore Ryan, Ph.D. Spring 2012.

<sup>51</sup>Theresa Amabile and Steven Kramer, “The Power of Small Wins on Creativity,” *Harvard Business Review*, May 2011. This article has an excellent daily diary to help managers identify behaviors that nourish and choke innovation initiatives.

<sup>52</sup>Tom Kelly, *The Art of Innovation*, (Random House: New York), 2001.

<sup>53</sup>“McKnight Principles,” [http://solutions.3m.com/wps/portal/3M/en\\_WW/History/3M/Company/McKnight-principles/](http://solutions.3m.com/wps/portal/3M/en_WW/History/3M/Company/McKnight-principles/)

<sup>54</sup><http://www.wholefoodsmarket.com/company/core-values.php>

<sup>55</sup><http://www.fastcodesign.com/1665008/the-inside-story-5-secrets-to-pixar-s-success>

<sup>56</sup>Gary Hamel, *What Matters Now*, (Josey-Bass; San Francisco), 2012, pp. 46-47.



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*The world is not what it should be. Let's make it better.*



**FORGE ADVISORS**, a unique international business consulting firm. We play dual roles of advising clients in improving their businesses performance and, where requested, actively assist in executing critical strategic, financial, and operational initiatives.

**WHY FORGE IS DISTINCT:** The Forge difference derives from our commitment to ensuring that all of our partners and senior consultants have substantive line management experience combined with blue-chip consulting backgrounds from firms such as McKinsey & Co., Monitor, Bain, and BCG. This enables us to combine systematic consulting methodologies and rigorous analytics with our understanding of the day-to-day challenges faced by senior executives to translate our recommendations into pragmatic and effective business solutions. Ultimately, we must deliver results and value which often requires answering not just “What” to do, but “How” to do it. Often, our clients ask us to help execute. This is the Forge difference.

**BUSINESS STRATEGY**

- Business Planning
- Operational Efficiency and Business Process Design
- Marketing and Market Research
- New Product/Service Development and Launch
- Business Incubation

**OUR CLIENTS:**

Our principals have served global blue chip & high growth clients across various industries achieving measurable impact.

## SERVICES WE OFFER TO ENGAGE IN PHASE FOUR INNOVATION

### **INNOVATION LECTURES, WORKSHOPS & RETREATS**

Our teams work both on and off-site to deliver powerful experiences designed to speak to the challenges of Phase Four innovation which require we engage the human spirit as the root cause of innovation.

### **EXECUTIVE COACHING**

Our team members have extensive C-suite coaching experience, some for more than 25 years within Fortune 50 contexts.

### **CUSTOM INNOVATION PROGRAMS**

Our teams provide custom innovation programs to deliver real value. We work with you on developing the right structures, processes, values, and insights for your own cultures. We offer training sessions and facilitation.

### **STRATEGIC MANAGEMENT CONSULTING**

Beyond new product development, our strategic management work helps set and scale business strategies to deliver bottom-line-oriented results.

### **SOCIAL STRATEGY AND ONLINE VISIBILITY**

Our team can help you engage like-minded communities worldwide through our extensive networks, social media, and direct conduits to the media (offline and online) for optimal audience reach.

## ABOUT THE AUTHORS

**DAVID DODSON** is a management consultant who works with clients in the innovative high-tech and new media industries on strategic and operational initiatives. As a partner with Forge Advisors, he has worked with leading Internet media companies to develop growth strategies, create business cases, re-engineer core processes, and cultivate market opportunities. Prior to Forge, he led private equity investments in telecommunications services and equipment providers as a Senior Associate with WorldCom Ventures, a corporate venture fund formed after the merger of MCI and WorldCom. The five investments he led, ranging from speech recognition to VOIP, generated a return of over 600%. He joined McKinsey and Company following his MBA from Georgetown University, and he holds a BSFS (Foreign Service) in Non-Western History and Diplomacy magna cum laude from Georgetown University.

**ALLEGRA JORDAN** cultivates cultures of innovation alongside senior international leaders in secular corporate and non-profit, and faith contexts. These contexts range from the commercialization of sub-orbital space flight to leading marketing efforts at USATODAY.com, where the audience grew from 10,000 people a month to 8 million+ visitors. More recently she has helped craft a culture of innovation across 10 countries in Asia for a major public health and development firm; produced a TEDx conference on “Beloved Community;” and served as an internal consultant for Duke University’s Center for Reconciliation which included conceptualizing and launching its globally significant Reconciliation Institute. Ms. Jordan has been named a top executive under 40 in Austin, Texas, and Birmingham, Ala., and by *Time* magazine as a Rising Star. She is an honors graduate of Harvard Business School, where she has also written twelve cases for the innovation, marketing, and foreign investment curricula. In addition to this work, she is an active speaker, facilitator, and board member of influential non-profits such as Africa Rising, the Southern Documentary Fund, and the Harvard Club of the Research Triangle.

**PARESH SHAH** is a experienced innovator, entrepreneur, executive, business educator/trainer, facilitator, and management consultant. He is founder and managing director of Forge Advisors, a leading strategy and management consultancy. His work helped incubate several companies including a major satellite-based internet and media company which has raised over \$130 MM in order to serve rural communities in India for e-learning, telemedicine, societal programs and connectivity to bridge the digital divide. Prior to forming Forge, Mr. Shah was the Senior Vice President of Strategy and New Business Development at Cidera, a broadband wireless content delivery network and the Vice President of Strategy, Marketing and Business Development for Aether Systems (Nasd:AETH). Mr. Shah was a Senior Engagement Manager at Monitor Company, a strategic consultancy. Mr. Shah led teams of management consultants helping Fortune 500 executives, non-profits and leaders of countries with competitive strategy and building high-performance organizations, businesses and products. He helped grow the firm from 150 to 1000 employees worldwide during his tenure. In the course of his career at Monitor, Mr. Shah was selected to design and deliver internal and client training/education curriculum focused on Strategy, Innovation and Marketing. He provided training to over 40 client firms worldwide, over 250 internal consultants and facilitated over 50 strategic offsites and critical meetings for clients. Mr. Shah received his MBA from the Harvard Graduate School of Business Administration (HBS). While working with Professor Rangan, Mr. Shah published three HBS business case studies. Mr. Shah graduated 1st in his engineering class with a Bachelor of Science degree from the University of Maryland in Mechanical Engineering and Product Design.