

Appendix III

The *PathFinder* Lab Journal Field Notebook

A PDF download of this Notebook is available at www.greenleaf-publishing.com/signs

The *PathFinder*
Lab Journal

Field Notebook



Corporantes, Inc



Own Who You Are®

CORPORANTES is the PathFinder that helps us uncover the truth we do not yet know, leading to the action we have yet to take.

Pragmatic Inquiry®

A method of reflection to ignite your values and vision to drive personal and organizational sustainable performance.

Our Values and Our Vision are what guide us as we choose and confront the problems, opportunities, issues, trends, challenges and competitive situations that face us.

Values Statement

“A Value is any belief, principle or virtue held so deeply (consciously or unconsciously) that it guides our Behaviors, Decisions and Actions.”

RON NAHSER

A Behavior is an Action that gives evidence of a Value.

Vision Statement

A *Core Purpose* defines the fundamental reason for an organization’s existence from a market perspective — the needs it meets (“What business are you in?”). It is based on and grows out of the *Values*.

A long-term aspirational *Goal* is not quantifiable, is highly intuitive and is used to motivate and inspire. It is based on and grows out of the *Core Purpose* (Includes a Vivid Description—what it will look like when we achieve our *Goal*.)

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*Igniting Your Values & Vision
to Drive Sustainable
Organization Performance*

Leadership Challenge Inquiry — “What’s Really Going On — and What Can I do About It?”

What is your question?

The purpose of your Inquiry is for you to address a strategic issue, idea, challenge, opportunity, or problem that you and your organization face. For example, consider the larger context of the dramatic evidence of climate change, energy issues, and the increasing scarcity of resources all societies face in our efforts to build a sustainable world for us and for future generations. Every part of our often inequitable carbon constrained, consumer economy — how we live together and exchange the things we need and value — has to be re-thought and re-designed. And the process of facing these enormous challenges starts with each of us.

The premise of your Inquiry is to help define the problems you see, needs you think you can address, and then develop ideas to meet those needs. During your Inquiry, you will test those ideas, based on the evidence of your experience and learning. The outcome of the Inquiry will be to decide on the best course of action for you and your organization to take to test the Ideas; after all, that is the reason for its existence.

A major weakness of traditional problem solving approaches is the lack of awareness around the assumptions (unstated contexts or paradigms) underlying the issue — or even what the real issues are, which always involve overcoming barriers in meeting some need. This lack of awareness stems from a decision making process that fails to take into account the larger and longer-term context, align the competing views and different data around unclear questions and assumptions. This is as true for individuals as it is for groups.

And most importantly, strategy decisions need to be based on the Values, Core Purpose and Goals — the Vision — of the individual and the organization:

“Own who you are”

— the expression of your character, culture and your brand.

The *PathFinder*, as the name implies, helps participants come to a decision leading to action, based on the evidence of their experience. Alignment can be achieved through data evaluation from different perspectives and a rigorous and open interpretation of the data where “everyone holds a piece of the truth.”

We will look in depth at the three elements which are too seldom examined in most decision-making processes and overlooked in the day-to-day pressure of business:

1. Your Values and Beliefs which guide your behavior, decisions and actions.
2. Your Core Purpose — “what business are you in.”
3. Your Goals — what is the result, the aim, of accomplishing your purpose.

During the course of your Pragmatic Inquiry, you will have the opportunity to think about the issues that are important to you, answer your questions, determine needs to be met, develop ideas and implement a plan of action.

The result will be a clear plan and strategy with compelling reasoning — told with your true voice often as a story — to support it and engage others in the Path Ahead. It will be based on work you believe in — “Own Who You Are,” your “calling,” and your unique marketable value as a leader. You will also have followed the advice of one of our greatest strategists and leaders:

*“If we could first know **where** we are, and **whither** we are tending, we could then better judge **what** to do, and **how** to do it.”*

ABRAHAM LINCOLN, “A HOUSE DIVIDED,” JUNE 16, 1858

Baseline Exercises — write your answers in the *Begin Attentively* section of the Notebook

1. As you move forward, what question, issue, doubt, problem, opportunity do you and your organization face? What needs can you meet? Why is it important? What is the impact of your project?
2. Challenge/question **Cq**: What questions, doubts or barriers do you face in developing and implementing your Project — The Pragmatic Inquiry begins with a Challenge/question, which prepares you to examine your experience and challenge the assumptions, values, vision and hypotheses driving your Project.
3. What is your preliminary answer now? (Hint: Write quickly your best guess, hunch, or thoughts.)

4. What are your personal values, beliefs, goals, etc. and how are they impacting and driving your question and your answer?
5. Based on your answer, what action will you take? What action are you taking now?

During your Inquiry, you will probably revise your answers, and even your question as you get deeper into the work. At the end of the Inquiry, you will revisit your Baseline Work and compare it with your final work to see what you have learned and where you are headed now.

Kinds of Inquiry Questions

Every inquiry begins with a question, idea, problem, barrier, need, issue, doubt, opportunity or challenge and a tentative answer that will drive the Inquiry. Here are questions that have begun Inquiries in the past.

- What are the Values of the Organization? Why are they important?
- What is the Core Purpose and Goal of the Organization — what is our reason for existence? What business are we in?
- What are our Social and Environmental Responsibilities?
- What is our view of the future?
- Who are our customers?
- What needs in society do or can we meet?
- What are our core competencies? Are they relevant & differentiating?
- Is our strategy sustainable?
- What investments should we make?
- How do we innovate and renew?
- What Values and Visions are driving my behavior, decisions and actions?
- What are my personal and career goals?

Learning To Read The Signs — Why Practice Pragmatic Inquiry

Each day of our lives, we are confronted with facts, problems, barriers, conversations, situations, ideas, issues, opportunities and challenges that demand our attention. This is especially true now, in light of the overwhelming evidence of potentially catastrophic climate change which is threatening to overshadow the perennial economic, business, social and political concerns.

Usually we react to this daily flood of information and events almost automatically by fitting them into our existing patterns and habits of thinking and behaving. (And if the facts and events don't fit into our patterns of belief, we tend to ignore them.) That's because we assume we know what's going on — what the facts and events mean — and based on these assumptions, we decide what to do. But the information and events are no more than signs, clues, evidence or symptoms and our interpretations of them may not be the best choice, especially since our complex environment is always changing!

The importance of a question...and a baseline answer.

Learning begins when some fact, idea, incident, barrier, or opportunity comes along that forces us to stop and begin to question or doubt what we know or challenge what we value. We now state what we know and value as assumptions which are treated as an hypothesis to be tested. We begin to re-think our experiences, our plans and what we know and value, and then search for new explanations. We are, in effect, reinterpreting the meaning of our experiences into new belief patterns.

This is where the method of inquiry outlined in this Notebook can be so helpful — by challenging our assumptions and providing a time-honored and well-tested practice that can help us interpret the signs in new ways. The result of the inquiry may range from a small adjustment in plans to a complete change in direction.

The method of Inquiry is based on Pragmatism; so-called “Classic American Philosophy.” It is an original American insight that the

meaning of ideas is determined by their consequences — by what action results from the ideas. This takes us far beyond the usual stance of “*do whatever works*” to a stance of putting ideas and beliefs to the test in action. It offers the thoughtful business practitioner and student a simple, efficient way to inquire into and act on the pressing questions they have on which they must decide and act.

Pragmatic Inquiry concerns itself with consequences. In the case of igniting values and vision, issues to be addressed are ones which deal with turning the problems and issues into needs that you can address.

“Education is / not the filling of a pail, / but the igniting of a fire.”

WILLIAM BUTLER YATES

How To Practice Pragmatic Inquiry

Pragmatic Inquiry provides a practical method of reflection for personal and corporate success for which the *PathFinder* serves as a guide. It offers a flexible framework of exercises to help you — individually or as a group — look at a situation, problem, opportunity or idea from several angles to put it in a more realistic context. With this better picture, better investment decisions can be made.

By adapting the stance of a Pragmatic Inquirer, you avoid the two traps of either staying with an idea, position or strategy too long, or reactively changing it without any basis of values, purpose or goal. Also, too often, leaders implement partial solutions or simple strategies for complex business challenges when a comprehensive, integrated approach based on values and vision is necessary.

Central to this inquiry is to treat your career and the organization as living entities with values, a vision, character, talent, a service to provide, a goal to reach, a path to follow and a story to tell. As with any journey, there are questions: What is the purpose? Why do you believe in it? What is the destination? What is the best path? How to prepare? What investments need to be made? Who to travel with? When to go? How do you measure progress? How do you measure success?

Inquiry mindsets

Each step in your inquiry requires a different cognitive and emotional stance. Based on our experience with thousands of executives and students, here's the habits of thought required.

The *Begin* phase — attentive, humility, asking tough questions, not knowing the answer and being open to learn.

The *Explore* phase — being open, observant and attentive, especially to data you might not like or usually overlook. Be prepared to have your thinking diverge.

The *Interpret* phase — imaginative, intuitive where you are “connecting the dots” from the *Explore* phase and using your eyes and ears and heart.

The *Decide* phase — responsible, thinking, using the head, logic.

And the crucial step of *Action* — the courage to ignite your values and vision in the face of obstacles that are sure to arise.

Finally, *Begin Again* — as evidence comes in and the context changes, new challenges arise, and the Inquiry begins again.

Keep notes on an ongoing basis.

Be open to surprises, capture vague impressions, feelings and memories—as well as hard data—and look for patterns and connections over time. Be willing to test your hypotheses and entertain new explanations and ideas in which you don't now believe.

Remember that most cases of discovery have involved moments of insight and intuition that were non-linear and unexpected!

“I write to discover what I think.”

DANIEL
BOORSTIN

Begin Attentively Instructions

Begin Your Inquiry with Questions, an Idea or Need and a Baseline Answer.

Questions

1. As you move forward, what question, issue, doubt, problem, opportunity do you and your organization face? What needs can you meet? Why is it important? What is the impact of your project?
2. Challenge/question **Cq**: What questions, doubts or barriers do you face in developing and implementing your Project.

Baseline Answer

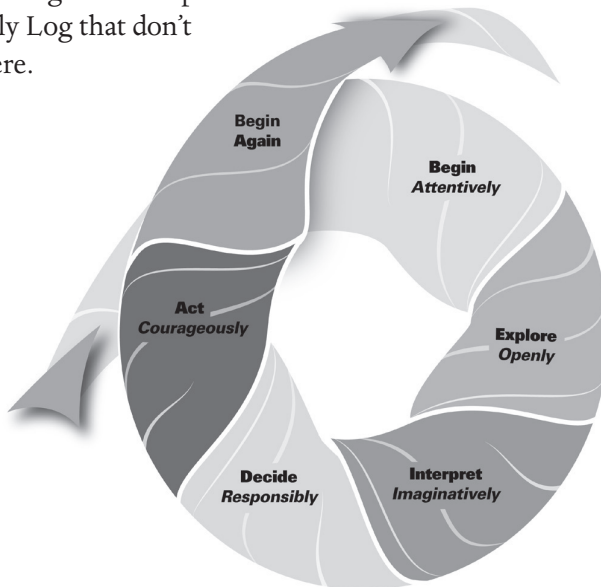
3. What are your preliminary answers now? (Hint: Write quickly your best guess, hunch, or thoughts.)
4. What are your personal and organizational values and vision and how are they impacting your answer? (Note: Your values and vision are what focused your attention on your question in the first place.)

Baseline Action

5. What actions are you and your organization planning to take or are taking now? How do purpose and mission shape the actions you're taking?

During the inquiry, note if your question is changing, becoming clearer, etc.

Put daily thoughts and experiences in the Daily Log that don't fit elsewhere.



Explore Openly Instructions

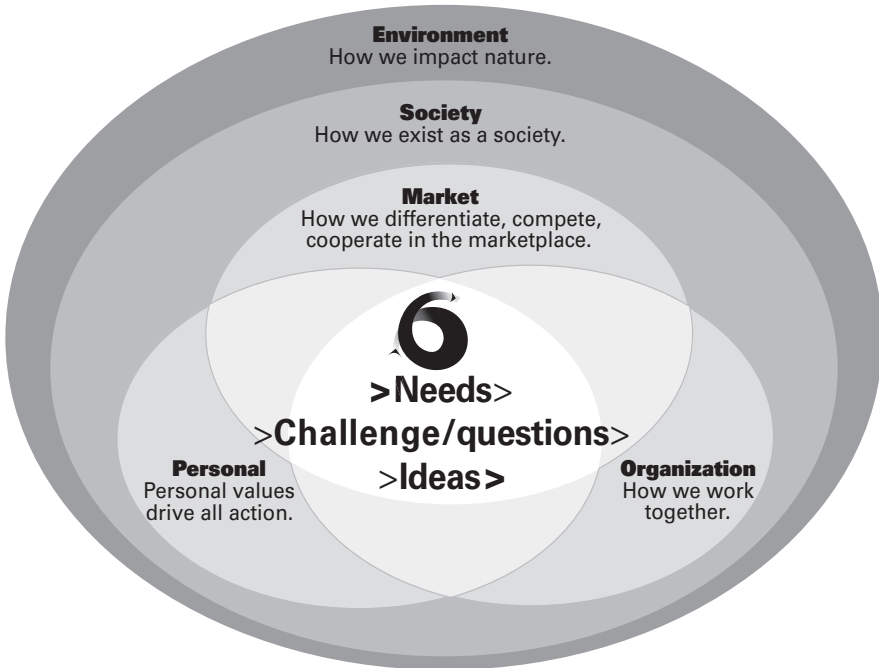
All strategic questions involve three relationships:

- You personally and professionally
- Your organization/industry/profession
- The markets you and they serve (including customers, consumers, citizens, prospects and competition in general)

Identify these three elements narrowly or broadly.

These relationships exist within the larger society/community and the environment, without which we could not exist! (Please read this sentence again.)

Strategic Stakeholder Networks



Pragmatic Inquiry

Revealed Needs _____

Identified Challenge/questions **Cq** _____

Actionable Ideas _____

Interpret Imaginatively Instructions

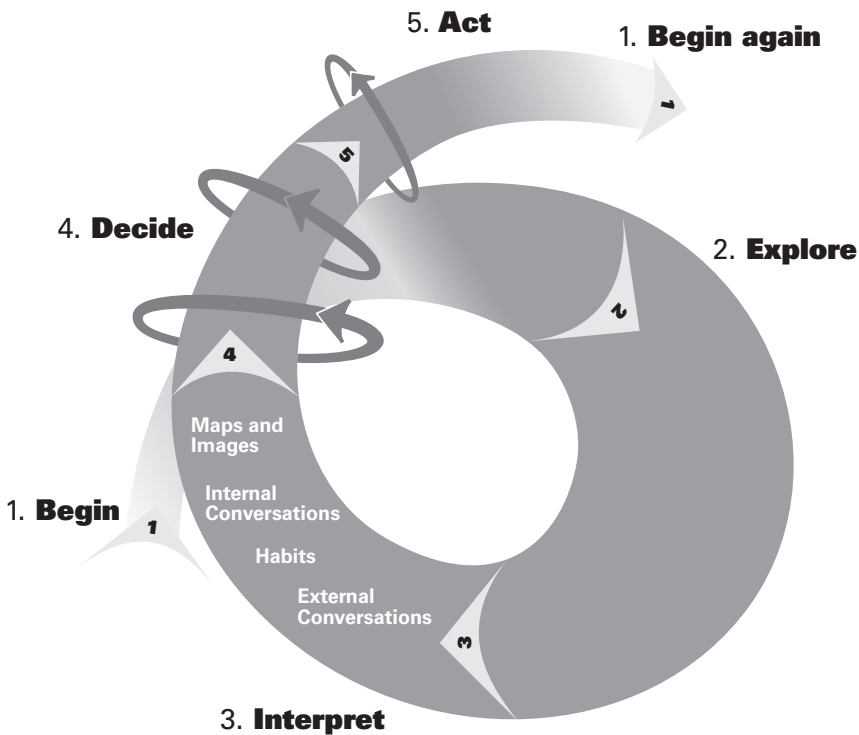
External Conversations: What are the conversations going on in your Stakeholder Network?

Compare your ideas with other Stakeholders. Who do you need to talk with?

Habits: What are known and unknown Stakeholder practices, patterns of culture, beliefs, barriers, strategies or tactics which lead or limit your progress?

Internal Conversations: Explore your inner voice through what you think others might say.

Maps and Images. What does your Project and Challenge/question **Cq** look, feel and sound like now. What will it look like when it is successful?



Decide Responsibly-Hypothesize Instructions — Continue To Explore

What questions are coming to you?

What answers are coming to you?

What values, beliefs, core purpose, goals etc. are becoming clear?

Conclude:

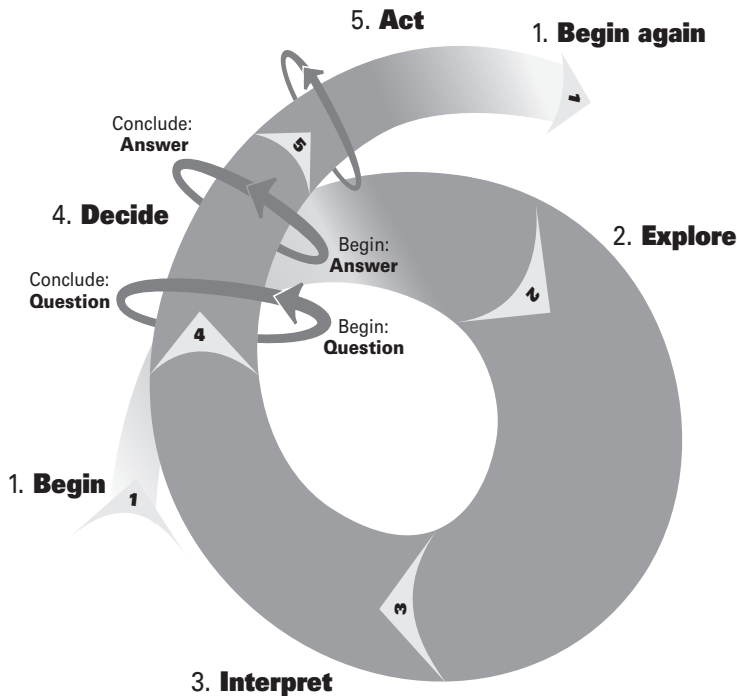
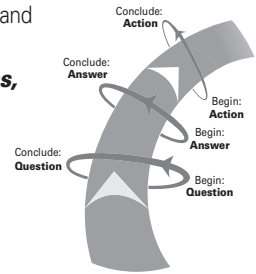
1. What is your Challenge/question **Cq** now?
2. Why is it important; its impact?
3. What is the answer to your Challenge/question **Cq** now?
What is the need you are meeting?
What is your idea to meet that need?
4. What values, beliefs, knowledge, assumptions, core purpose, and goals is your concluding answer based on?

Compare your conclusion with your *Begin* Baseline work.

What have you learned?

The purpose of the inquiry is to challenge assumptions, your initial thoughts. Compare your *Begin* and

Concluding **Questions, Answers and Action.**



Act Courageously

Continue to Explore

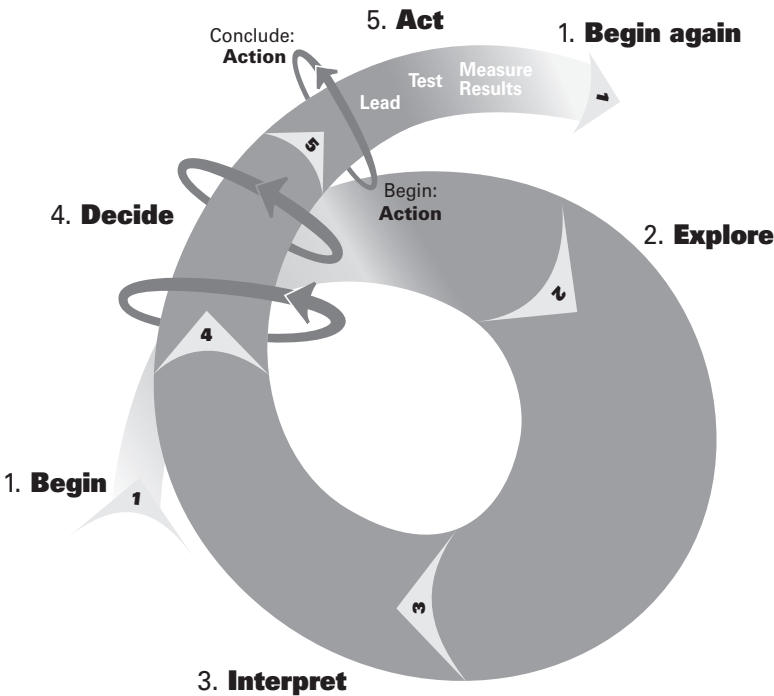
What new ideas may be developing for action plans?

Conclude

Put your **Hypothesis** to the test in action:
What will you/your organization do now?
What investments will you make?
How will you involve and lead others?
Will your actions be sustainable?
How will you measure results?

Measurement

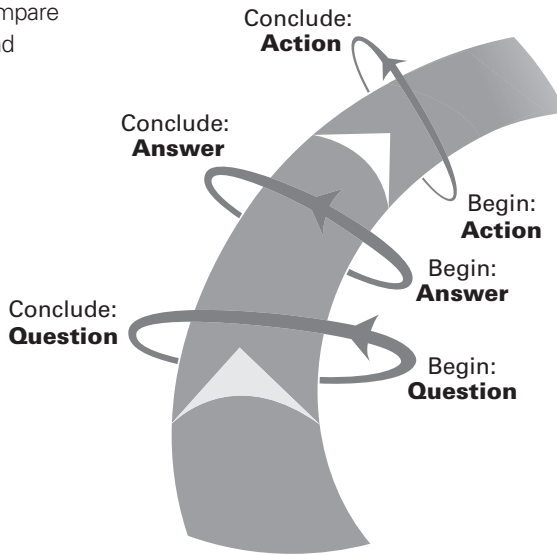
Every decision has consequences and these can and must be measured. This is not “whatever works,” but is a foundational test of how the decision enters reality and creates results, both intended and unintended.



Conclusion – What is learned

What have you learned?

The purpose of the inquiry is to challenge assumptions, your initial thoughts. Compare your Begin and Concluding **Questions, Answers and Action.**



If the goal of life is some version of “Know Thyself” (“Own Who You Are”) and take action on that, then this reflection is the full measure of the success of the Inquiry.

Here is where you see, feel and understand through your own evidence, written in your own hand, what is different. You may now see more objectively what truth you have uncovered.

It is especially instructive and impactful for you to read carefully your Baseline and compare where you are now and what your interpretation of the “evidence of experience” means to you. See how your question and answers have changed. And see the differences in your management practices.

As John Dewey has said:

*“The aim of education is not to put theory into practice,
but to make practice understandable.”*

Conclusion

Begin Attentively Again

Here is where the word “Hypothesis” is most important. The decision is held tentatively as results come in. Then, just as in the past, a chapter ends and another chapter of Inquiry begins again.

What are your Challenges/questions /etc.?

What needs will you meet?

What are your ideas?

