



CORPORANTES
"Own Who You Are"®

P.O. Box 6629 • Evanston, Illinois 60204-6629 • (312) 845-5000 • www.PragmaticInquiry.org

Note: What follows are the introductory sections of the PathFinder Lab Journal: WHY, WHAT, HOW.

Not included are the 5 major inquiry domains: Begin, Explore, Interpret, Decide and Act (see PathFinder Field Notebook) and the 9 minor domains and the description of the inquiry mindsets for the domains.

For the complete PathFinder Lab Journal, contact Corporantes, Inc.

The PathFinder Lab Journal™



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



Corporantes, Inc
Evanston, Illinois

Dedication

Own Who You Are[®]

Pragmatic Inquiry[®] is the *PathFinder* that helps us uncover the truth we do not yet know, leading to the action we have yet to take.

The *PathFinder* Lab Journal is dedicated to those searching for a better way in which they and their organization can uniquely, sustainably and profitably improve all of our lives.

Pragmatic Inquiry[®]

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

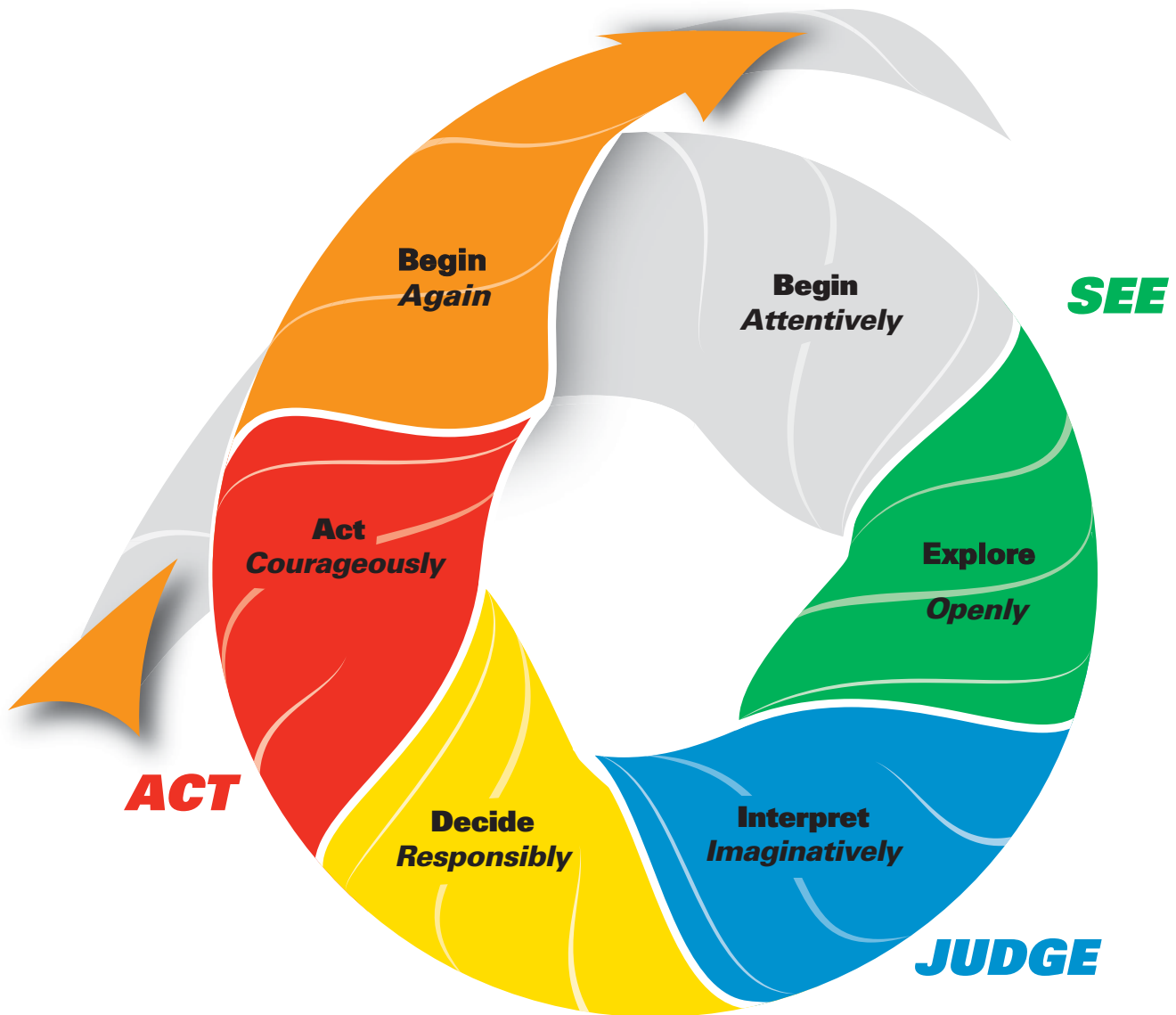


CORPORANTES, Inc. • P.O. Box 6629 • Evanston, IL 60204-6629 • 312.845.5000
www.PragmaticInquiry.org

Copyright © 2017 by CORPORANTES, Inc. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of CORPORANTES, Inc. DePFM: T78_Niagra_FM_T02

PathFinder Arc of Pragmatic Inquiry[®]



All inquiries begin with questions. What are yours?

Baseline Exercise – write your answers in the Begin section (Grey tab) of the Lab Journal

1. As you move forward, what need, problem, issue or opportunity do you see which you and your organization might address?
(Why is it important to you and the organization?)
2. Challenge/question **Cq**: What challenge, question, barrier, obstacle, concern, problem, issue do you and your organization face in meeting this need?
(Who else is your Challenge/question **Cq** important to, and why?)

Baseline Answer to your Challenge/question **Cq**

3. What is your preliminary answer(s)? (Hint: Write quickly your best ideas, thoughts, hunch or guess.)
4. What are your organizational and personal 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?

NOTE: What follows is the Pragmatic Inquiry *PathFinder* Lab Journal used for developing business and personal strategies for organizations:

- Explanation of the practice of Pragmatic Inquiry
- Range of uses of Inquiry
- Outline of the Inquiry steps
- And finally the Lab Journal itself.

We hope the power of questions, the process of Pragmatic Inquiry, and the use of blank pages will prove creative and stimulating to your Inquiry to uncover the work which you are to pursue during your career and lead systemic change.

I Why Practice Pragmatic Inquiry?

**Learning to Read the Signs—
Why Practice Pragmatic Inquiry?**

**The importance of a Challenge/question...and a
baseline answer**

Kinds of Inquiry Questions

- Organization Values and Vision Inquiry
- Strategic Market Planning & Problem Solving Inquiry
- Personal Values and Vision Inquiry
- Possible question starters

**What are the defining characteristics of a leader:
“Why Knowing Yourself Matters”**

- Communication
- Narrative

Learning To Read The Signs— Why Practice Pragmatic Inquiry?

Each day of our lives, we are confronted with facts, problems, 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 or challenge opportunity comes along that forces us to stop and begin to question or doubt what we know or challenge what we value; what we call a Challenge/question 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 why the method of inquiry outlined in this Lab Journal 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.

Kinds of Inquiry Questions

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

Organization Values and Vision Inquiry

This is for senior executives or members of a senior management team who need to inquire about their Organization's Values and Vision.

- What are the Values of the Organization? Why are they important?
- How have they been formed and tested? What is the evidence?
- What is the Core Purpose and Goal of the Organization — what is our reason for existence? What business are we in?
- What is our culture? What do we need to affirm or change?
- What are our Social and Environmental Responsibilities?
- What is our view of the future?
- How will we shape/intercept it?

Result: Own Who You Are — Organization Brand.

Strategic Market Planning & Problem Solving Inquiry

This is for senior executives or members of a group who face a particular challenge or issue concerning their relationship with the marketplace and within the organization:

- 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 is our brand reputation to our stakeholders?
- What direction should we pursue?
- What action should we take?
- What investments should we make?
- How do we innovate and renew?

Result: Own Your Business Idea and Direction — Strategy.

Personal Inquiry

This is for students beginning their careers, executives contemplating a career change and senior executives reflecting on their legacy. Individuals inquire about the essence of their leadership beliefs in order to determine where they should

make the investment of their careers relative to a company, industry or profession.

- What Values and Visions are driving my behavior, decisions and actions?
- Whom do I want to serve — what Market, Population, Community or Audience?
- What needs do they have which I can meet?
- What are my ideas to meet these needs?
- Why am I pursuing a business career? (What am I passionate about?)
- What challenges do I face?
- What are my competencies?
- What are my personal and career goals?
- What is my “calling” — the work that I cannot *not* do?”
- With what Organization, Industry, Profession or Group do I want to serve?

Result: Own Who You Are — Personal Strategy and Brand.

Possible question starters: Jim Collins and Michael Porter on strategy

The three questions that must be answered in the development of “Own Who You Are” (what Jim Collins calls the “hedgehog” concept) are:

1. What can you be the best in the world at?
2. What drives your economic engine?
3. What are you deeply passionate about?

“Level 5 Leadership” — *Harvard Business Review* July 2005, Jim Collins

Michael Porter has an equally simple framework for questions:

Strategy...

- is the creation of a unique and valuable position, involving a different set of activities.
- requires you to make trade-offs in competing — to choose what *not* to do.
- involves creating ‘fit’ among a company’s activities.

“What is Strategy?” — *Harvard Business Review* Nov-Dec. 1996, Michael Porter

*All it takes to begin a Pragmatic Inquiry is
a serious challenge, question, need, concern, idea, doubt or opportunity.*

What are the defining characteristics of a leader: “Why Knowing Yourself Matters”

There are many definitions of a leader, but they generally center on being able to enlist others in a project the leader thinks and feels is worth doing. In order to do this, the leader must have first embraced the work themselves. As many have put it, the leader must “be authentic to be trusted.” The *PathFinder* Inquiry helps you to “know thyself.”

Communication

Many scholars on leadership hold to the importance of being able to communicate to others — what Noel Tichy calls “the ability of the leader to give meaning to work and enlist others in the task”, and as Warren Bennis has put it, “A leader is someone who can express themselves fully.”

We agree. It follows on the leader’s ability to articulate what and why they hold the views they do. And we believe that its foundation is the Values and Vision of the individual and the organization they serve.

It also is very important to understand that this began as searching for the truthful ground for communication based on your values, core purpose and goals and then express these in the unique marketable advantage. The result of your work was to be able to explain this memorably and persuasively to others.

Therefore the issue of leadership creating shared meaning through communication is a major outcome and result of the inquiry.

And we discovered that this applies to *individuals* as well as *organizations*. Hence Dean Woo’s observation about *PathFinder* applying to both.

Narrative—Importance of Developing a Story to Communicate

Inquirers are encouraged to see their inquiry unfolding as telling a story with the movement and drama that entails. They can then see better the direction their path has been, is going and give them choices to make for future direction.

This narrative approach engages those who are very sure and getting what they want out of life — their life plans — but are now up against some challenge,

‘those whose plans seem to be going awry’, and those who see their lives as seemingly random, existential reaction life.

Based on the evidence of their experience, from the events, coincidences, chance occurrences, there seems to emerge connections, patterns, and a direction. We often here this referred to as a “life’s work” or as a “Calling”; some higher purpose that seems to continually appear to us as we search for the meaning and direction of our lives.

That is why many of the early pragmatists referred to the continuum of the pragmatic process as “the pursuit of the truth we do not yet know, leading the action we have yet to take.” Many saw the discipline of science much as a detective does, making sense of clues to determine what happened, is happening, and might happen.

Every story begins with a situation with characters engaged in some situation, uncertainty, conflict, etc. As you will see in the “*Begin*” section, the various uses of the *PathFinder* depend on properly framing, the challenge as a question which begins the drama of the Inquiry.

Once they are engaged in a Challenge/question **Cq**, they can then begin to see their question in terms of having a past, a present and a future. They can then draw on their life experiences.

That is what engages people to explore their story and find meaning leading to “what happens next.”

To put this in more conventional terms: The goal of the Inquiry is helping individuals either collectively or individually make better decisions concerning strategy (which can also be thought of as a business way of telling a story.)

But you can also see that if you accept the premise that both individuals as well as groups are engaged in a drama or “story”, it can be used at any stage of a career. Everyone is on a path making decisions all the time, either inside a corporation or on their own. All these involve choices, investment and risk; the stuff of strategic decisions.

II What is Pragmatic Inquiry?

Definitions

Introduction

What is Pragmatic Inquiry?

How is Pragmatic Inquiry Different?

**Leadership Challenge Inquiry—
What is Your Challenge/question?**

Understanding Values

The Importance of Reflection

***PathFinder* Pragmatic Inquiry for
Strategic Decisions on Individual Career
and Leadership Direction.**

Pragmatic Inquiry Outline

***PathFinder* Target Audience Needs**

Definitions

Pragmatism: the meaning of ideas/thoughts/values is determined by their consequences — by what actions results from them. (e.g. “By their fruits you will know them.” *Bible*—Matthew 7:16)

Project: An idea for a product or service which will or is addressing some market/society need, opportunity, problem or issue.

Challenge/question [Cq]: Question, doubt or barrier that you face in developing and implementing your Project.

Pragmatic Inquiry®: The discipline to reflect on the evidence of experience to examine and challenge the assumptions, values, vision and hypotheses driving your Project. The aim is to learn and “begin again.”

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*.)

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

WILLIAM BUTLER YATES

II What?

INTRODUCTION

Question: “What is *PathFinder* Pragmatic Inquiry?”

Answer: “It’s Strategic Planning for Individuals, as well as for Organizations.”

CAROLYN WOO, DEAN
MENDOZA COLLEGE OF BUSINESS
UNIVERSITY OF NOTRE DAME
BETA GAMMA SIGMA BOARD MEETING, JUNE 2000

What is Pragmatic Inquiry?

Pragmatic Inquiry is a discipline which aims at igniting values and vision to drive sustainable organization performance in serving market/society needs.

Pragmatic Inquiry provides a practical method of reflection and learning for personal and organization success for which the *PathFinder* Lab Journal “(*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.

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 misunderstanding and stance of “*do whatever works*” to a stance of putting ideas and beliefs to the test in action. It offers the thoughtful management practitioner and student a simple, efficient way to inquire into and act on the pressing questions and challenges they have on which they must decide and act.

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?

How Is *PathFinder* Different?

PathFinder Pragmatic Inquiry, while having broad application, has a very specific focus: it is to help individuals and groups make strategic decisions based on their values, by reflecting on the “evidence of their experience.”

There is no end to the strategic planning frameworks to be learned on the one hand and the organizational behavior, and competence models on the other, from which to choose in helping organizations and individuals be more effective. (Consider the number of Leadership books pouring from computers and printing presses the world over.) While these are useful, philosophical thought over the centuries has been developed to ask basic questions and Pragmatism in particular focuses on critical thinking and actionable questions.

Pragmatic Inquiry draws on philosophy and depth psychology by basing strategic decisions on not just behaviors and competencies, but on the values, vision and goals on which the behaviors and competencies rest WITHIN THE CONTEXT OF A CHALLENGE/question and testing HYPOTHESES.

Leadership Challenge Inquiry— What is your Challenge/question?

Every Inquiry begins in the context of an organization addressing some market/society need, issue or problem that the organization thinks it can serve...better than the competition.

The purpose of your Inquiry is for you to address a strategic issue, idea, challenge, or problem that you and your organization face — in serving that need — and frame it as a question, what we call a Challenge/question. Since it is the key “element” in the inquiry, we symbolize it as **Cq**.

As one starting point, 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 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 for products and services 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; afterall, 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 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.

The *PathFinder*, as the name implies, helps participants come to a decision leading to action, based on the evidence of their experience. Alignment with your personal values and vision—your “calling”—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 that 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 — it will enable you to “Own Who You Are,” and follow 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

Understanding Values

The basic premise of Pragmatic Inquiry is that at whatever level the issue or question or problem or challenge is framed — or at whatever stage in the person’s career — decisions and action ultimately rest on the values, purpose and goals of the individual and the organization.

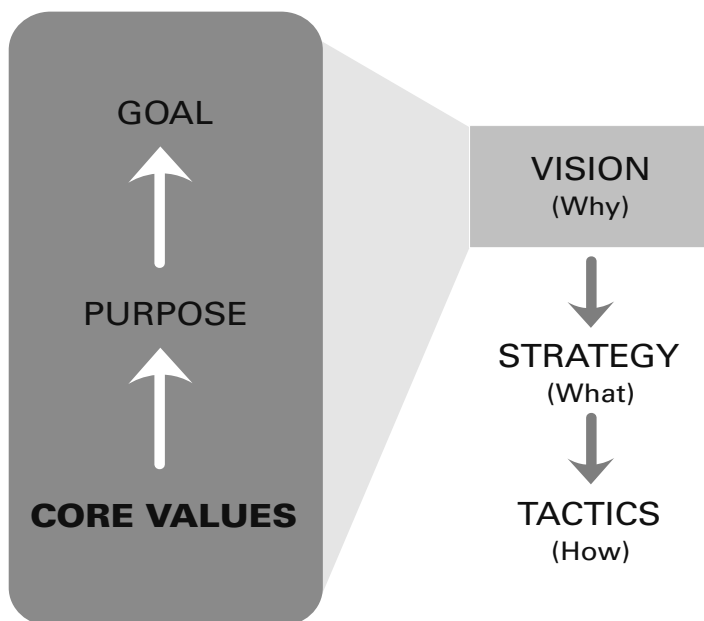
The Importance of Reflection

Executives all say they don’t have enough time for reflection. The structure of the *PathFinder* provides the method and place for thinking which gets beyond the extremes of either focus on data or the “stream of consciousness” which often does not critically challenge present thinking, assumptions and beliefs.

The goal is to uncover and position Values and Vision as the foundation driving strategies.

This point is simply shown in the earlier work of Jim Collins on which his best selling books *Good to Great* and *Built to Last* are based:

Values and Vision Drive Strategy



Source: *Beyond Entrepreneurship*, Jim Collins and William Lazier

***PathFinder* Pragmatic Inquiry for Strategic Decisions on Individual Career and Leadership Direction.**

Every one of us in organizations or contemplating a career faces decisions on what to do next; which way to go. And each one of these decisions involves risk because time, effort and resources will be invested under conditions of uncertainty. That is why we have adopted the name *PathFinder* to describe the time and direction dimensions of strategic decisions.

Since the method of inquiry is based on a combination of pragmatic philosophy (the scientific method of hypothesis formulation and testing called “abduction”), moral philosophy and integral depth psychology it is valuable in personal reflection. Inquirers do this by examining the “**evidence of their experience**” using intuition as well as rational thinking.

“I write to discover what I think.”

DANIEL BOORSTIN

Pragmatic Inquiry Outline

1. Begin *Attentively!*—Challenge/question **Cq**

- As you move forward, what market need, problem, issue or opportunity do you see which your organization might address?
(Why is it important to you and the organization?)
- Challenge/question **Cq** : What challenge, question, barrier, concern, problem, issue do you face in meeting this need?
(Who else is your Challenge/question important to, and why?)
- What is your preliminary answer now?
- How are your values impacting your answer — and your question?
- What actions should be taken? (What action is being taken now?)

Daily Log — Your place to put thoughts and ideas that may bear on your present inquiry or be the basis for new inquiries

2. Explore *Openly!*

Look at your question from these 5 strategic perspectives and see how each impacts your question. Gather data, experiences and trends:

Personal | Organization | Market | Society | Environment

3. Interpret *Imaginatively!*

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

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?

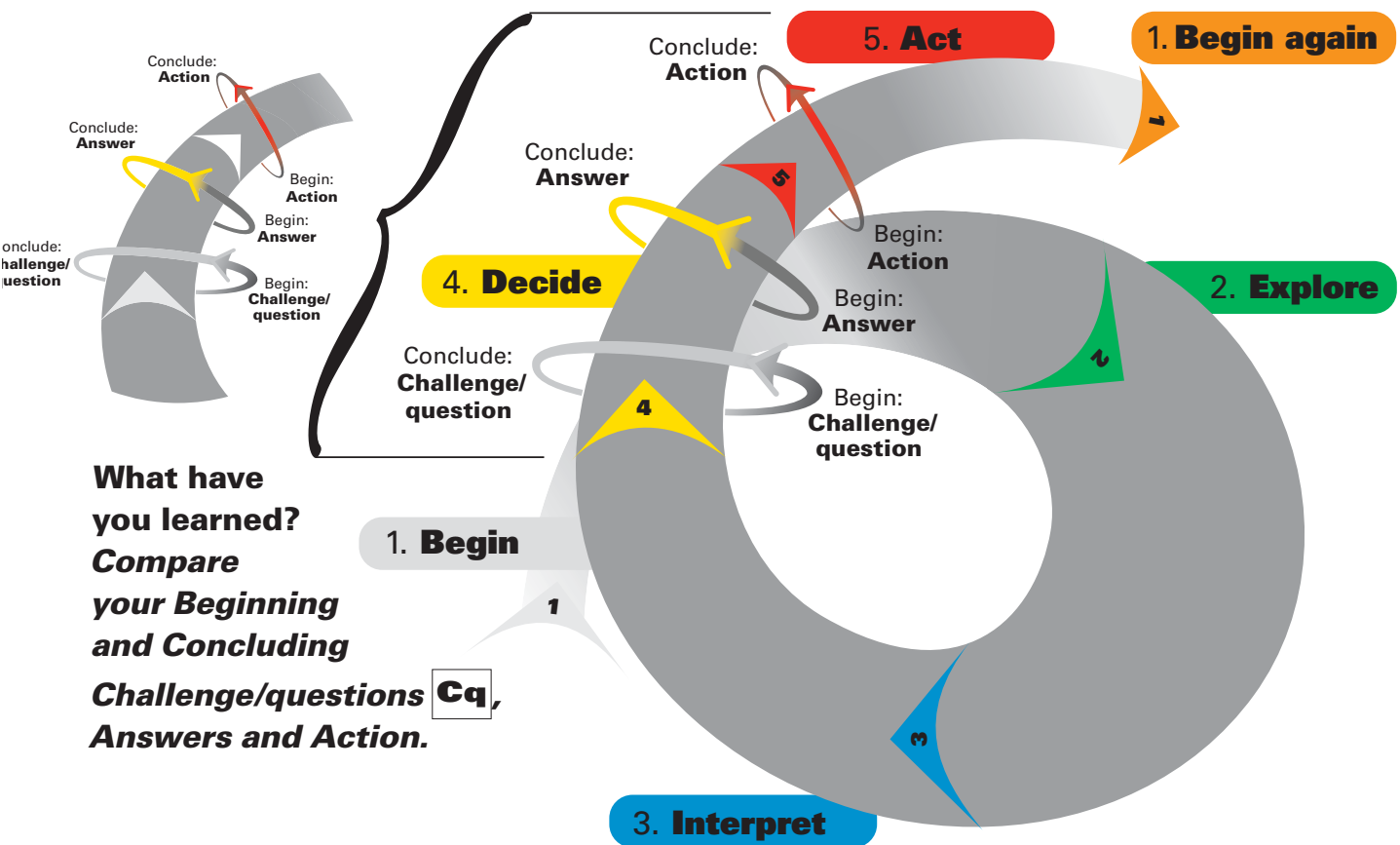
4. Decide *Responsibly!*

What is the question and answer now? **What have you learned?**

5. Act *Courageously!*

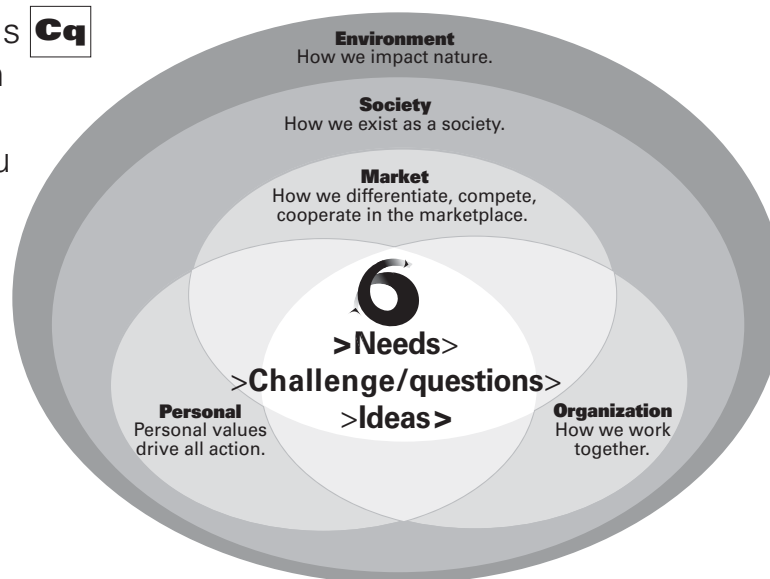
Put your hypothesis to the test in action. What actions will you and the organization take? How will you lead? What will you measure? Will they be sustainable?

What Path can I take from here? PathFinder Pragmatic Inquiry Process



Strategic Stakeholder Network

Your Challenge/questions **Cq** will identify a problem in serving a market need. In developing an idea you must consider all other stakeholders as well.



***PathFinder* Target Audience Needs:**

PathFinder Pragmatic Inquiry offers you and your team a way to:

- Better understand the reality in which you operate.
- Think critically about your thoughts and beliefs concerning a challenge or question you face.
- Learn to think more creatively.
- Think together to make the best use of multiple perspectives and talents.
- Make informed decisions to guide actions.
- Identify core underlying issues.
- Create a compelling vision and action plans driven by values, core purpose and goals.

To use more traditional strategic planning* “business-speak”: These processes have been proven to help individuals and organizations attain a sustainable competitive advantage in the marketplace by re-energizing decision-makers to solve complex business problems and build stronger identity or “brands” for themselves and their organizations based on their unique marketable values.

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.

**Strategic Planning involves making the investment decisions/choices that determine the direction and success of individuals and organizations.*

III How to Practice Pragmatic Inquiry?

How to get the most from your *PathFinder* Lab Journal

The *Mindset* of a Pragmatic Inquirer

1. Begin

Mindset Begin Attentively

Overview

Key Objectives

Daily Log Tab

2. Explore

Mindset Explore Openly

Overview

Key Inquiry Points

Exercises:

Data, experiences and trends from different perspectives

- The Market
- The Organization
- Personal
- Society
- The Environment

3. Interpret

Mindset Interpret Imaginatively

Key Objectives

Exercises

- External Conversations
- Habits
- Internal Conversations
- Maps and Images

4. Decide

Mindset Decide Responsibly

Instructions

Key Objectives

5. Act

Mindset Act Courageously — The Path Ahead

Key Objectives

How to get the most from your PathFinder Lab Journal

As you begin your *PathFinder* Inquiry, remember that this Lab Journal is yours to use as you find it most helpful. Write in it when ideas or situations come to you. If you don't, they will slip away. Date all entries so you can keep track of how your inquiry is developing over time. Many find that writing in the morning or late at night works best when they can stop and reflect.

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 insight have involved moments of intuition that were non-linear and unexpected!

Don't worry about grammar, structure, etc. Think of your Lab Journal as a sketchbook or notebook full of scribbles, disjointed thoughts, ideas, etc. Out of your many entries will emerge a pattern. You can move around to the various sections as ideas and information come to you. Some sections will be more useful than others, but attempt to put entries in them all before you are done.

The Importance of Different Mindsets

You will note at the top of each major tab a section entitled “**Mindset**” which describes the psychological stance that we suggest you take for each step of the Inquiry. These instructions are helpful especially since each one of us has a particular strength in thinking and making decisions. We have found one of the great benefits of Pragmatic Inquiry is that, by going through the individual steps, you will access and practice different intellectual and psychological mindsets for more successful results.

Since each step in the Pragmatic Inquiry of *Begin, Explore, Interpret* and *Decide* and *Act* appeals to and utilizes different emotional stances (echoing Myers-Briggs Archetypes, for example), this goes a long way to explaining why we hear over and over: “*PathFinder* Pragmatic Inquiry looks easy, but it’s not.”

Lastly, many find that the most valuable step comes after you review your work and then “**Begin Again**” with an even better question, issue, need or idea...a better **Cq**.

“Learning — [is] a continuous process of reconstruction of experience.”

JOHN DEWEY