

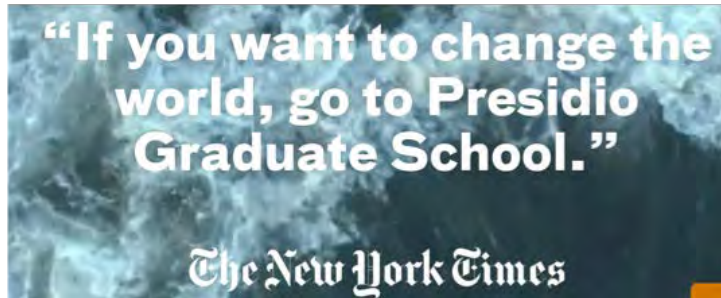
*Igniting Your Values
& Vision
to Drive
Sustainable
Organization Performance*



PRESIDIO
GRADUATE SCHOOL

The *PathFinder*

Lab Journal[®]



**What are my Big Ideas to
"change the world"?**



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.



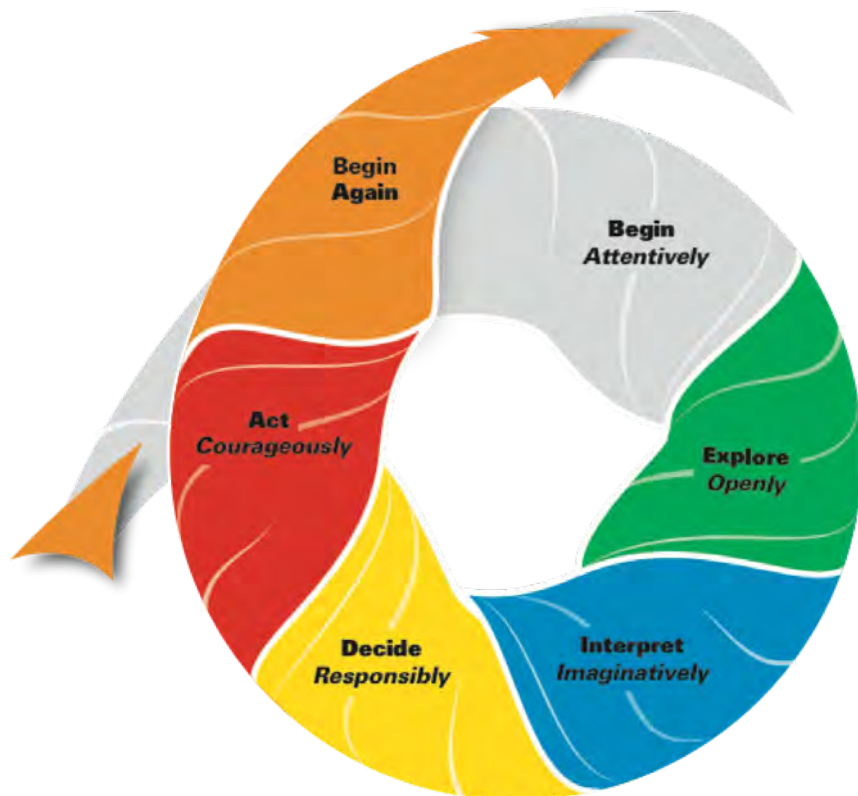
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The *PathFinder* Lab Journal[™]



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I Why Practice Pragmatic Inquiry?

Learning to Read the Signs— Why Practice Pragmatic Inquiry?

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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 **Cq**. 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?

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**Leadership Challenge Inquiry—
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The Importance of Reflection

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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.

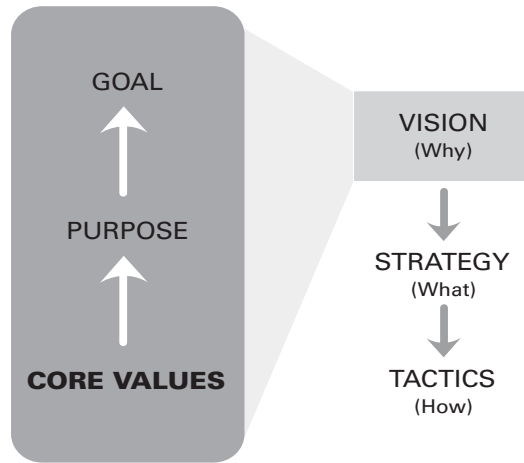
The Importance of Reflection

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?

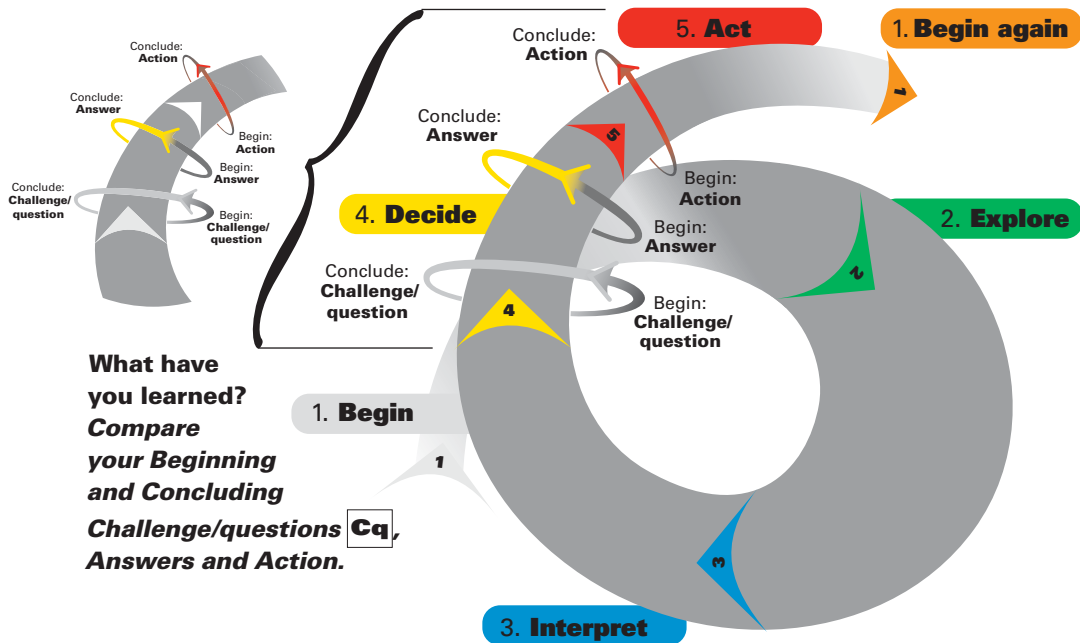
4. Decide *Responsibly!*

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

5. Act *Courageously!*

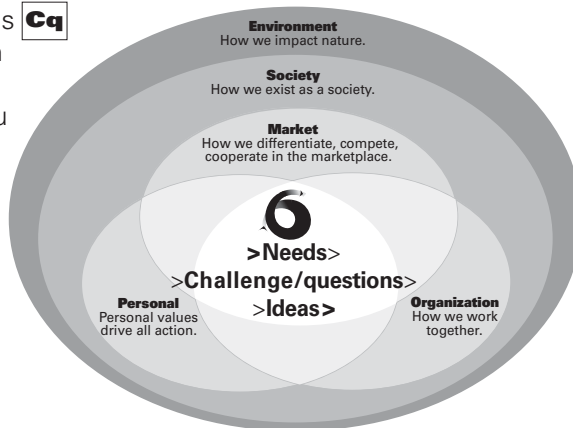
Put your hypothesis to the test in action. What actions will you and the organization take? How will you lead? What will you measure? Will they be sustainable?

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-invigorating 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

The *Mindset* of a Pragmatic Inquirer

Research indicates five mindsets—a different one for each step in your inquiry — are found in the most successful leaders. They are able to move between and combine the opposite mindsets of thoughtful/reflective *and* action-oriented. This follows the spirit and practice of Pragmatic Inquiry, and confirms the findings of Jim Collins’ “Level 5 Leadership” (referenced before) which he characterizes as “Humility and Fierce Resolve.”

Note that the 5 tabs are color coded to remind you of the different steps in the inquiry.

Also, the different colors are to suggest different *frames* of mind that each step seems to require.

Begin Attentively (*Gray* to suggest uncertainty.) — take the stance of a questioner and be open to admitting you don’t know all the answers and need to learn.

Explore Openly (*Green* to represent “feet on the ground.”) — be concrete, get facts. Engage many diverse points of view and opinions. “Diverge.”

Interpret Imaginatively (*Blue* to represent inspiration and “blue sky.”) — be creative, intuitive, open to hunches. “Converge.”

Decide Responsibly (*Yellow* to represent the sun, the ancient symbol of knowledge.) Weigh the evidence, make judgements, and come to an answer.

Act Courageously (*Red* to represent the heart, the symbol of courage) — ignite your values to drive your decision.

Begin Again (*Saffron* to represent wisdom) You now are ready to ask better questions and test better ideas.

1. Begin

Section Contents

Mindset

Overview

Key Objectives

Daily Log Tab

Mindset Begin Attentively

Be concerned, uncertain, questioning — be open to admitting you don't have all the answers.

The *Begin Attentively* phase requires Attention and Humility — having Challenge/questions **Cq**, some ideas but unsure of the best ones, and being open to learn.

- Be attentive to problems, needs, challenges, questions, and their impact.
- Be prepared to state and challenge assumptions, ideas, concepts & values.
- Be prepared to be surprised.
- Be prepared to listen and learn from other perspectives.
- Be prepared to act.

Overview **Begin Attentively**

Begin Your Inquiry with Needs, Ideas, Challenges, Questions, the Values driving your inquiry, and a Baseline Answer and Action.

Questions

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

Baseline Answer to your **Cq**

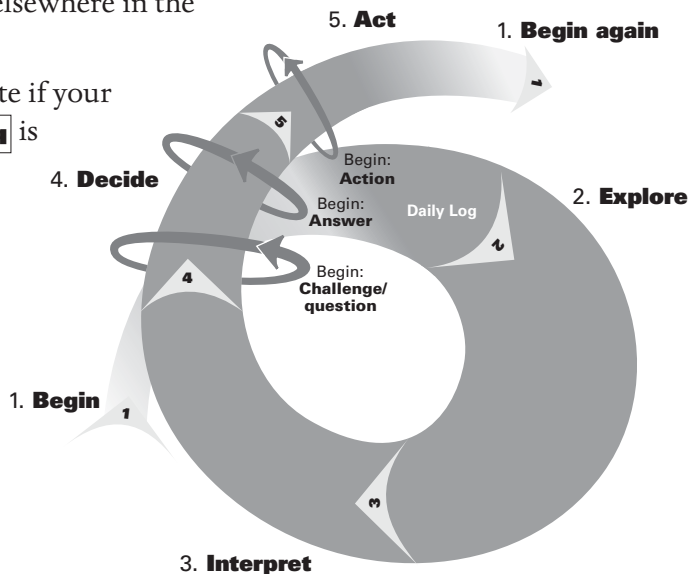
3. What is your preliminary answer now?
4. What are your organizational and personal values and vision and how are they impacting your answer? (Hint: Your values and vision are what focused your attention on your question in the first place.)

Baseline Action

5. What actions are you planning to take or are taking now?

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

During the inquiry, note if your Challenge/question **Cq** is changing, becoming clearer, etc.



Key Objectives Begin

Context

What is your Challenge/question?

Every Project begins in the context of an organization developing some idea for a product or service to address some market/society need, issue or problem that the organization thinks it can serve...better than the competition.

Then the Inquiry begins with a question or doubt about a challenge or barrier you and your organization face in developing and implementing your project — the Challenge/question symbolized by **Cq** — because questioning prepares us to examine our assumptions.

In all Inquiries, even a Values & Vision Inquiry, the question must be placed in the context of a career or organization Challenge facing the project. The problem is probably what triggered the Inquiry in the first place. So you want to identify the issue and identify how the values impact on it. You want to see what market need is behind your question, and then what ideas you have to meet the Challenge.

Language

Listen to how you label your area of concern and adopt its name for the remainder of the Inquiry. You might call it a: “question, concern, challenge, issue, opportunity or problem.” You may call it: “where am I going?” “What do I really want to do?” “What needs doing?” “What are my ideas?” etc.

(Beneath every pragmatic question, there is a need to be met. And that is the purpose of every organization: It exists to serve some need.)

Throughout, refer to the baseline question/issue/concern/challenge as “your Challenge/question **Cq**.” But if you find it helpful to use another label that resonates with you, use it.

Baseline

1. 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?)
2. 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?)

To test whether a **Cq** is important, ask: “What are the consequences of the answer and what possible decisions can be made”— not what specific answers, but the kinds of decisions and outcomes might result when you get an answer — e.g.

- “We will then be able to decide on how to develop new products or structure our marketing department.”
- We will be able to solve problems and meet market needs.”
- “Our organization will have a better strategy.”
- “I will be able to decide on my career direction.”

Who else might care about the Challenge/question **Cq**? Would those whom your organization serve think it is an important **Cq**?

Answering this will sharpen the question and show if it is actually actionable for you. Often people realize, when they consider the scope of their question, that it is too broad and they narrow it so they can actually have an impact. Or vice versa!

3. Baseline Hypothesis What is your best answer to your **Cq** now? (You may have several ideas.)

This critical piece of the process identifies a frame of reference, assumptions, fixed opinions, pat answers, traditional patterns, etc.

Write this quickly — don’t over think this. Occasionally, people say: “I don’t know. That’s why I am doing an Inquiry.” But everyone has some hunch on the answer — otherwise they wouldn’t have asked the question in the first place. It is vital to get an initial answer or answers down in order to focus the Inquiry and test hypotheses.

This Base Line step is central to setting up your learning, because now you have something to test.

Psychologists say that when a person states their answer, then they have little interest in changing it, but only want to defend it. Yet, we have found that people often feel better about getting their initial answer out. It helps them look at their answer more objectively.

Your baseline answer, therefore, is essential because it lays the groundwork

for learning in the *Explore* and *Interpret* steps. But be prepared to treat it as a hypothesis.

4. **Baseline Values** How are your values impacting your decision and actions now and how might they impact them in the future?”

Your Inquiry will be an opportunity for you to actually see, by examining the evidence of their experience, what values are at work in you.

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

RON NAHSER

Note: Remember, too, that an inquiry gets started because something happened or is happening which challenges your values and assumptions.

Ultimately, one of the major results of Pragmatic Inquiry is to determine and clarify what and how your values and vision are driving you.

5. **Baseline Action** What specific action do you think you should take? What actions are you taking now?

The purpose of developing a baseline action is to show that ideas have consequences and that the baseline action probably is already in movement. In this exercise you want only to brainstorm quickly and not to allow too much time on specific tactics which will bog down in details. You do not want to spend time prematurely on solutions. Quickly get the information out and then move on to the *Explore* step.

The Prepared Mind

The main benefit of Pragmatic Inquiry is the power to focus attention on your question, test your assumptions, develop ideas and put them to the test in action. You now know what to look for and test. This prepares the mind, as scientists say.

“Chance favors the prepared mind.”

LOUIS PASTEUR

Begin Instructions

Begin Your Inquiry with a Challenge/question and a Baseline Answer.

Questions

1. 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?)
2. 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?)

Baseline Answer

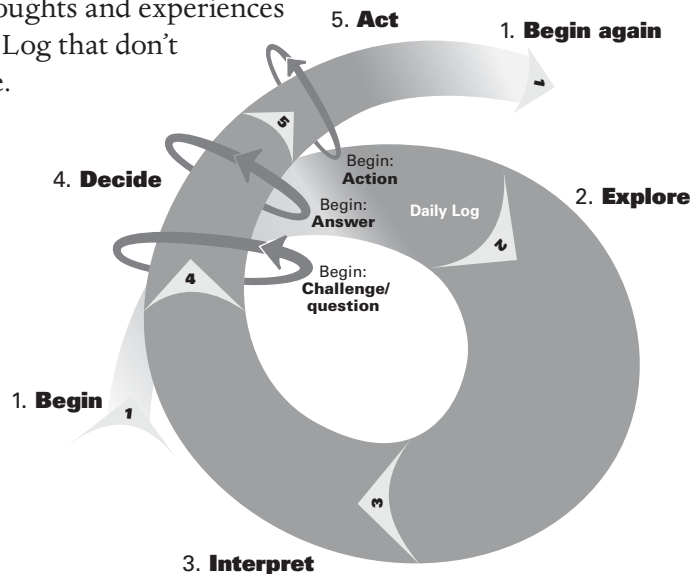
3. What is your preliminary answer now?
4. What are your personal values and how are your values impacting your answer? (Note: Your values focused. Your attention on your question in the first place.)

Baseline Action

5. What actions are you taking now? How does your sense of 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.



Daily Log—Be Attentive

(Use this tab as a marker to locate your latest work in this section)

Your question will focus your attention.

This is the place to put daily thoughts and experiences which bear on your present inquiry or which might suggest an issue for the next inquiry.

What are you paying attention to? What is coming to your attention?

Many find the best time to write these thoughts and reflections is in the morning —“wake-up thoughts”— and at the end of the day. See if it leads to another section.

Also, whenever a thought occurs which does not easily fit in one of the other sections, record it here. It may be important later.

“Chance favors the prepared mind.”

LOUIS PASTEUR

Daily Log—Be Attentive

What am I paying attention to now?

What is coming to my attention now?

Wake up thoughts.

End of day thoughts.

Thoughts to come back to.

2. Explore

Section Contents

Mindset

Overview

Key Inquiry Points

Exercises: Data, experiences, memories and trends

from different perspectives —

- Market Bearings & Path
- Organization Bearings & Path
- Personal Bearings & Path
- Society Bearings & Path
- Environment Bearings & Path

Mindset Explore Openly

Be observant, open and attentive, especially to data you might not like or usually overlook. Be prepared to be confused with the mass of experiences, impressions, and scattered data.

The *Explore* phase — where you take in the facts, impressions, memories, observation — engages the sensate, fact-based stance. It requires you to be attentive and objective.

- Engage in systems thinking, actively seeking the ideas, assumptions and insights of all stakeholders.
- Look for unmet needs.
- Study your market and society competition.
- Get hard and soft “facts”: data, memories, stories, impressions.
— *look for trends, patterns and possibilities: past, present and future*
- Be relentless.

Overview Explore Openly

All strategic Challenge/questions **Cq** involve three relationships:

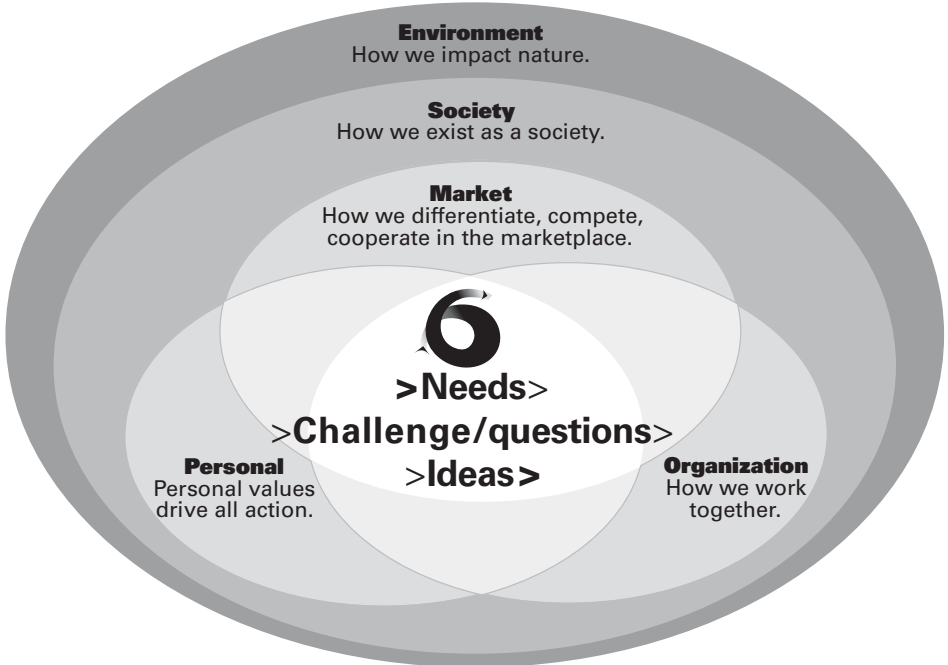
- You personally and professionally
- Your organization/industry/profession
- The markets you and they serve (including customers, consumers, citizens, prospects and competition in general)

Identify these three perspectives 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.)

Now look at your Challenge/question **Cq** from all five perspectives.

Strategic Stakeholder Network



Pragmatic Inquiry

Revealed Needs _____

Identified Challenge/questions **Cq** _____

Actionable Ideas _____

Key Inquiry Points

Divergent Thinking (often called “generative”)

Now, look at the baseline Challenge/question **Cq** and baseline answer from 5 different stakeholder perspectives. Explore and put down facts, hunches, ideas, memories, etc. etc. Your evidence should be scattered, contradictory and even messy, at this stage.

Be aware and explore a perspective you might not have considered closely.

Try to see the same piece of data from all five points of view. That can change dramatically the significance and meaning of an experience or a piece of data.

Data and Connections

The purpose now is to collect facts, events, impressions, hunches, thoughts, and most of all experiences, concerning your Challenge/question **Cq** from the five different perspectives:

- market (whom the organization, etc. serves)
- organization/profession/industry/field of study you are a part of
- personal
- society — impact of your **Cq** on society — local, regional, national, global
- environment — impact your **Cq** has on the natural/ecological system.

Difference Between “Bearings” And “Path”

For each one of the five perspectives, we suggest three distinct time periods:

- **Present:** The “**Bearings**” Step: Think back over a recent period of time — the last few days, weeks, months — not longer than a year. How had your Challenge/question **Cq** presented itself. One way to begin the writing is to state: “This has been a time when I became aware of my **Cq**...” and describe the immediate situation. This is comparable to a situation analysis, a “snapshot” or the current chapter.
- **Past and future:** The “**Path**” step: On the other hand, The **Path** Steps should give you a sense of the movement of the **Cq** — the background and potential future of the question. Ask yourself when the problem or issue first began; when you first became aware of it. In some cases, this may carry back you back a long way.

This gives your **Cq** a “history”; the earlier chapters of the story. Note particularly when choices were made — paths taken and not taken. Stephen Ambrose, the historian, noted: *“It is through history that we learn who we are and how we got that way, why and how we changed, why the good sometimes prevailed and sometimes did not.”*

Then based on this movement, ask yourself where the **Cq** and its story are heading. Where do you hope it is headed. **This last step is essential if you want to shape or “intercept” the future.**

NOTE: Personal Values Inquiry is a very good assignment for leadership, career and values for executives and students.

Explore Exercises: Data, experiences and trends from different perspectives

Personal Bearings and Path

Depending on the type of Inquiry, you can begin exploring at any point in the Strategic Relationships. For most Inquiries, the easiest place to begin is, of course, the Personal Perspective.

In *Personal Bearings and Path*, outline your particular involvement with the baseline **Cq** and look at the future path as well as the past path.

Answer the questions:

- Where am I now?
- Where have I been?
- Where am I going?

One good exercise is to think about your question or values and write quickly the path of your life when you first became aware of the question or value, right up to the present. What happened? What motivated you, and where do you now seem to be headed? What were the wrong paths and paths not taken. (They may not prove to be wrong or missed, afterall.)

Then get a sense of the direction of the story. Write down what outcome you want for yourself.

(You can see the path you are presently on, and seem to be headed, by writing your “obituary — what will you be remembered for.

It may be useful to read the New York Times obituaries for a week or so to get the perspective.)

NOTE: For Values inquiries specifically, what values are important in driving decisions; are they at work today. Then in the “Path” perspective, look to when did these values first become important in life. And where might they be leading you.

Organization Bearings and Path

Organization Bearings and Path, use the plural voice (“we” or “they” if the inquirer is not part of the organization, profession, or field yet.). “Where are we now?” Describe the present situation in the organization where you work or would like to work. Especially look at the organization’s strategy and decisions through a “climate study” and the lens of what values seem to be driving these. This will tell you what the values really are. Which is more compelling than what is written in their mission statement.

In the Organization Path ask: “Where did we begin and why? Where have we been? How did we get here?” Retrace the situation described in Organization Bearings. Look at the path that was followed and record milestones, alternatives chosen and rejected, and critical turning points.

Go back to key decision points and look at the “paths not taken.” It may be that now is the time to take one of them.

We now look to the future. Where is the organization headed? What might happen? What do you want to have happen? What can you help to have happen?

Market Bearings and Path

In *Market Bearings and Path*, the important point for you to remember is that however internally or individually focused your **Cq** may be, it relates in some way to the market — the people whose needs the organization, profession, field of study serves — whose needs are to be met. After all, they are the reason for the organization's existence. So, serving these needs must be put at the heart of strategy, and all **Cq** finally relate to the organization's ability to serve the market in some way.

Society Bearings and Path

In *Society Bearings and Paths*, look at your Baseline **Cq** in relation to society to understand and examine larger societal and local community trends and changes that have impact on your **Cq**.

People often state large issues in society that are important to them, such as globalization, just wages, hunger, over-population, AIDS, the plight of women, racial wars, terrorism, the poor, etc. This larger context also is discussed under the concerns of Corporate Social Responsibility, the Integrated Bottom Line, Social Entrepreneurship, etc., and must ultimately be as focused as the local community.

Environment Bearings and Path

In *Environment Bearings and Path*, we continue to look at the larger environment: the ominous trends in the environment such as global warming, destruction of natural resources, etc. and consider the impact individuals and organizations have, are and will make on our “natural capital.”

Both *Society and Environment* perspectives give you the broader and longer context in which to view your business and personal strategy. These perspectives provide the ultimate test of the sustainability of any strategy decisions and actions. Given these basic facts, please consider the following as the ultimate context for all we do:

“You can’t do business on a dead planet.”

DAVID BROWER

Remember that you are looking for data both for and against what your hypothesis is. As another great scientist, said:

“How can anyone not see that all observation must be for or against some view if it is to be of any service.”

CHARLES DARWIN

Market Bearings & Path—Stakeholder Perspective

Market Bearings

What's going on now out there with the market, consumers, customers, prospects and in general?

What are the needs of the market place we can serve?

What facts, evidence, thoughts and impressions are related to your **Cq**?

Market Path

Retrace important events and decisions in how the market, consumers, customers, prospects and competition in general have developed and where they might go in the future, especially in relation to your **Cq**.

What path did they take? (What path didn't they take?)

Where do you want them to go in relation to your **Cq**?

How did the needs of the market place develop and how might they develop in the future?

(Some Suggestive Question Starters
to Ask Yourself.)

Market Bearings

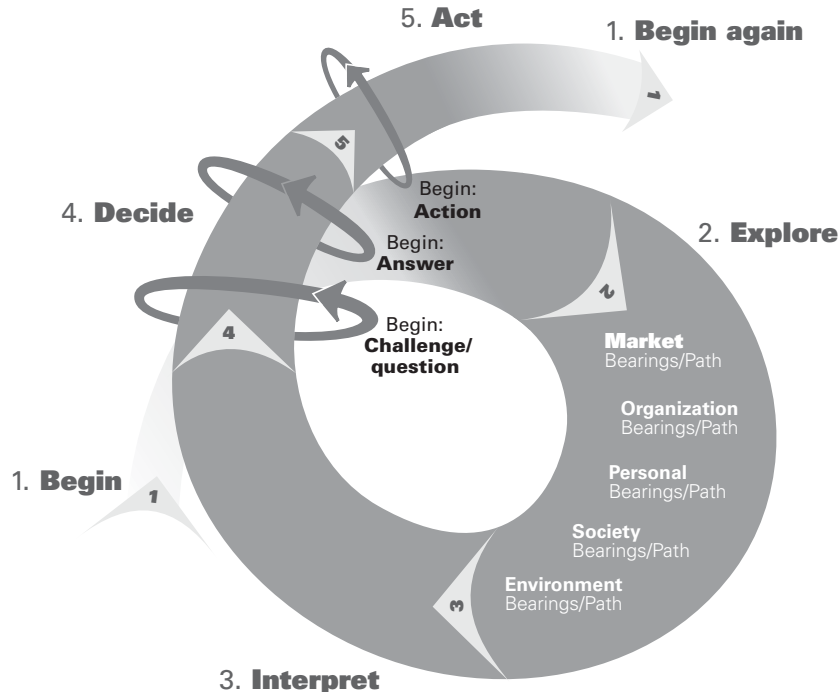
Where is your market —
whom you serve — now
with your question or idea?
What do they need?
Who else is serving that need?
What is this period like?
When did it begin?
What do you see?
What do you think?
What do you feel?
“This is a time when/that...”

Market Path—Past

When did your market begin?
Who was the competition?
What happened then?
What decisions/turning
points were there?
Who/what was important?
*“My market began when...
and then...”*

Market Path—Ahead

Where is the market headed?
Who will be the competition?
Where do you want it to go?
*“My market is headed...and it
could head...”*



Organization Bearings & Path—Stakeholder Perspective

Organization Bearings

What's going on now in your organization/industry/
profession/field of study? How are they serving the market?

What facts, evidence, thoughts and impressions are related to
your **Cq**?

Organization Path

Retrace important factors, events and decisions in how the organization/
industry/profession have developed in serving the market, especially in
relation to your **Cq**.

What path did they take? (What path didn't they take?)

Where does the organization, etc. seem to be headed?

Where do you want them to go in relation to your **Cq**?

(Some Suggestive Question Starters
to Ask Yourself.)

Organization Bearings

Where is your organization/industry
now?

What needs is it filling?

What are its Challenges/questions?

When did this period begin?

What do they see?

What do they think?

What do they feel?

“This is a time when/that...”

What happened then?

What decisions/turning
points were there?

Who/what was important?

*“My organization began when...
and then...”*

Organization Path—Ahead

Where is it headed?

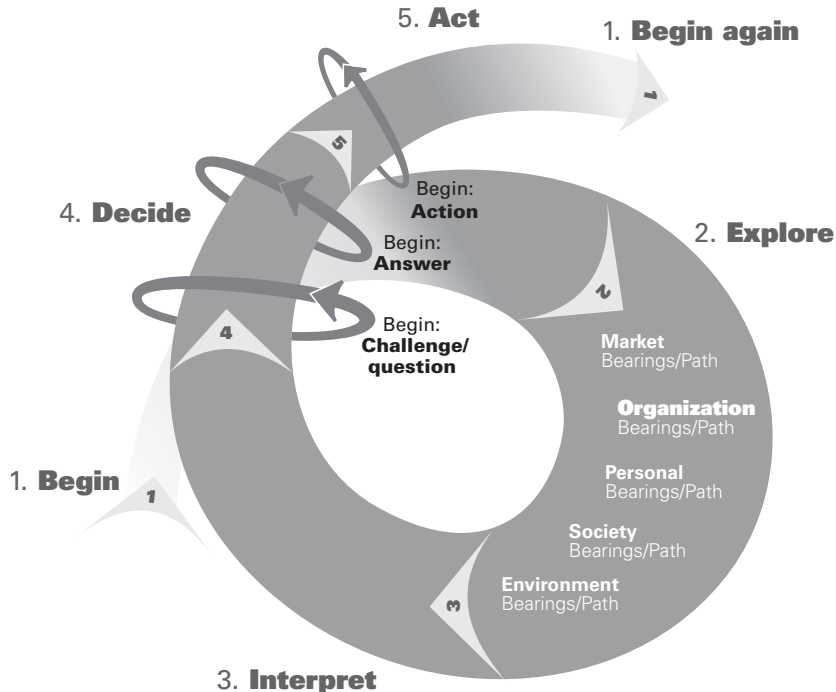
Where do you want it to head?

*“My organization is headed for...and it
can head for...”*

Organization Path—Past

When did your organization,
profession, or industry begin?

What needs did it fill?



Personal Bearings & Path—Stakeholder Perspective

Personal Bearings

Where you are now?

What's going on with you?

Where are you in relation to your **Cq**?

What values, core purpose and goals are at work?

What needs/problems do you need to address?

Personal Path

Retrace important events and decisions in how you got to where you are, especially in relation to your question.

When were you first aware of your **Cq**?

What path did you take? (What path didn't you take?)

How has your involvement with your **Cq** developed?

How have your values developed?

Where do you seem to be headed?

Where would you like to go, especially in relation to your **Cq**?

What values, core purpose and goals will guide your path?

(Some Suggestive Question Starters
to Ask Yourself.)

Personal Bearings

Where are you now with
your question?
What is this period like?
When did it begin?
What do you see?
What do you think?
What do you feel?
“This is a time when/that...”

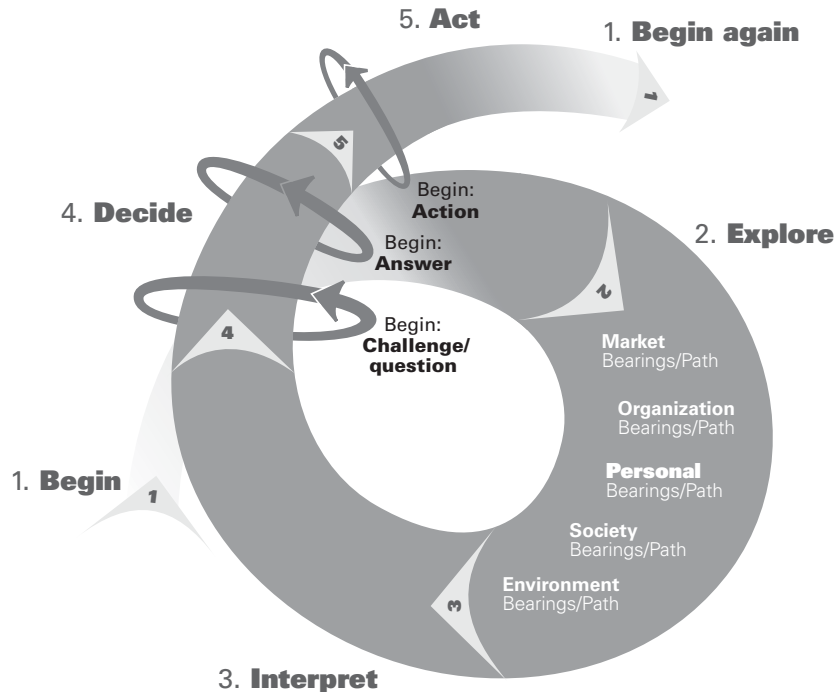
Personal Path—Past

When did the question begin?
What concern or event triggered it?
What happened then?

What other questions were there?
What decisions/turning
points were there?
Who/what was important?
“My question began when...”

Personal Path—Ahead

Where are you headed?
What do you want to have happen?
What do you want?
What will be success?
Who/what will important?
“My question leads to...”



Society Bearings & Path—Stakeholder Perspective

Society Bearings

What is the larger society which your question impacts?

What's going on in society now?

Where is society in relation to your **Cq**?

What are your thoughts regarding the situation you are facing now in the context of the larger society?

Society Path

Retrace the issue or problem you now face in terms of society's involvement.

Where is society headed?

How might you impact that?

(Some Suggestive Question Starters
to Ask Yourself.)

Society Bearings

How do you define society/
community?

What is this period like?

What issues?

When did it begin?

What do you see?

What do you think?

What do you feel?

“This is a time when/that...”

Society Path—Past

When did your society/community
begin?

What happened then?

What other questions were there?
What decisions/turning points
were there?

Who/what was important?

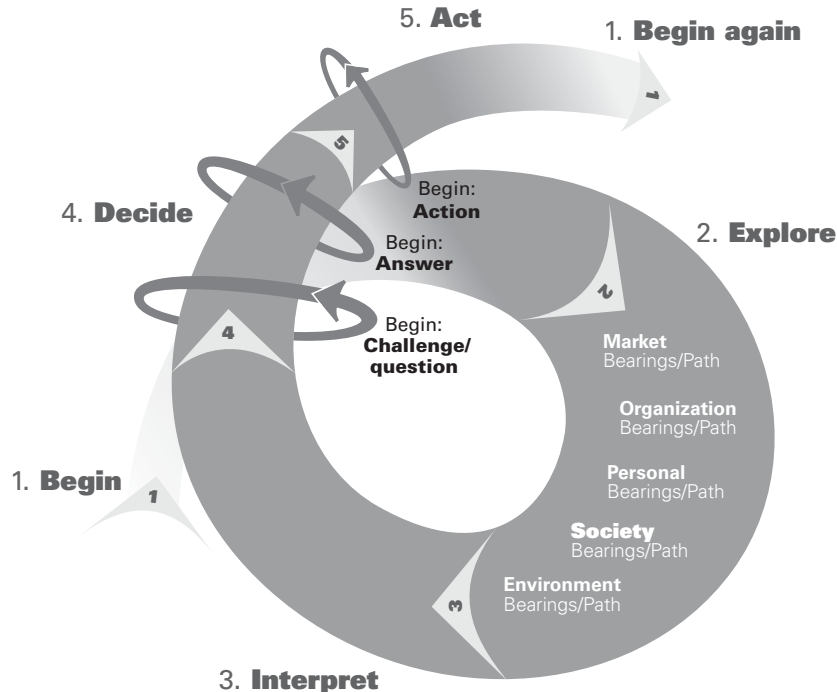
“My society/community began when...”

Society Path—Ahead

Where is your society/community
headed?”

Where do you want it to head?

*“My society/community is headed...and
can head...”*



Environment Bearings & Path—Stakeholder Perspective

Environment Bearings

What is your concern about the environment?

What do you see?

Where are you and your organization in terms of your impact on the environment?

How do you and your organization fit within the ecological system?

How does your **CQ** impact the environment?

Environment Path

What has been your impact on the environment? Is the impact you are having sustainable? And where is the environmental condition headed?

(Some Suggestive Question Starters
to Ask Yourself.)

Environment Bearings

Where is the environment —
eco-system — now?
What is this period like?
What issues?
When did this period begin?
What do you see?
What do you think?
What do you feel?
“This is a time when/that...”

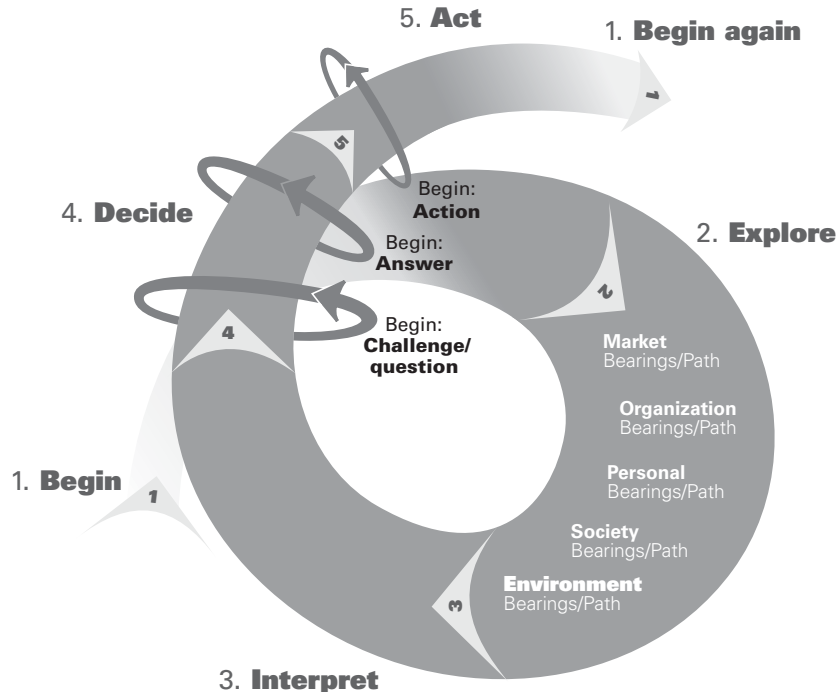
Environment Path—Past

When did the issues begin?
What happened then?

What other questions were there?
What decisions/turning points
were there?
Who/what was important?
“Environment issues began when...”

Environment Path—Ahead

Where is the environment headed?
What are the key factors?
Where do you want it to head?
What kind of a world are we making
for our grandchildren and future
generations?
“It is headed...and can head...”



3. Interpret

Section Contents

Mindset

Overview

Key Objectives

Exercises

Mindset Interpret Imaginatively

You might be feeling a bit scattered and overwhelmed by all the *Explore* data (“diverge”) you have entered, if you really looked at all points of view. Now it is time to digest and “converge.” Be creative, intuitive, open to hunches. See connections that weren’t obvious before. Openly debate and listen — especially to those whom you normally don’t (including your inner voice!). Ask yourself and others: “So What?”

The *Interpret* step is more imaginative. “Connecting the dots” from the *Explore* phase, using all your faculties.

- Keep mining the data for new meaning/patterns/trends.
- Actively exchange information and intentions.
- Ask good, tough questions — of yourself and others.
- Be open to changing your mind.
- Responsibly debate ideas and courses of action with your associates and others to test and verify your insights.
- Respect value differences.
- Try out new ideas and perspectives.

LISTEN

Overview Interpret *Imaginatively*

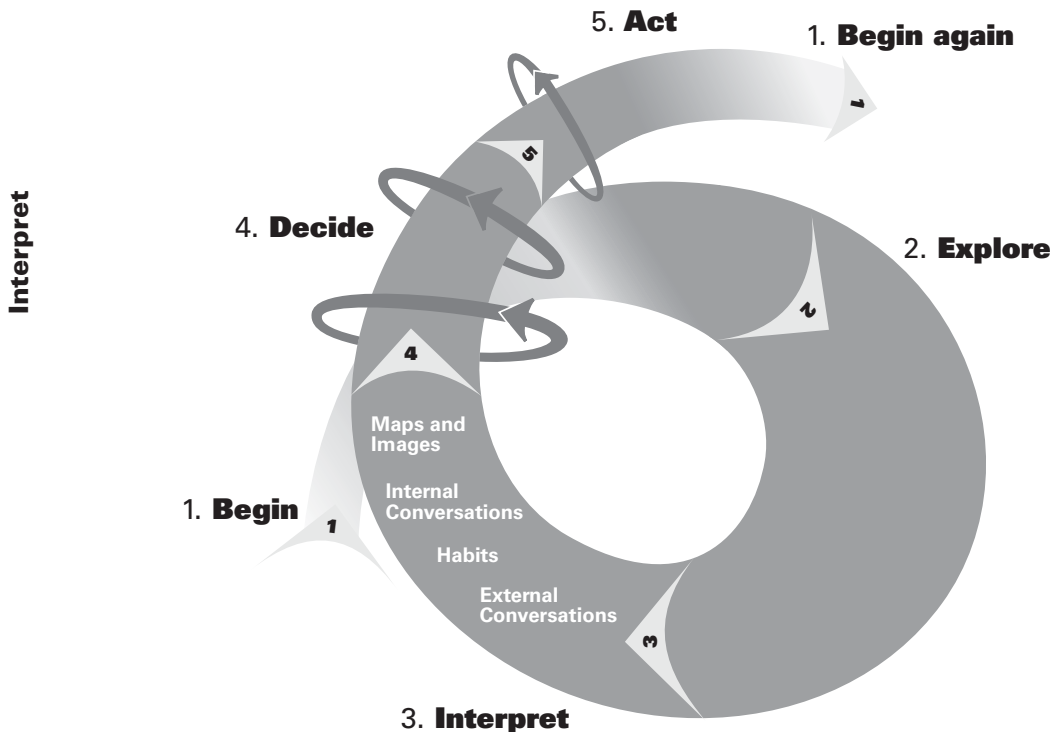
External Conversations: What are the conversations going on in your Stakeholder Network?

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?



Key Objectives

Converge

You might be feeling a bit scattered and overwhelmed by all the *Explore* data (“diverge”) you have written, especially if you really looked at your question from all five points of view. Remember Dante’s quote from the *Divine Comedy*, one of the most famous opening lines in all literature:

*“I woke in the middle of my life to find myself in a dark wood
where the right road was wholly lost and gone.”*

Now is the time to begin to see what the evidence of your experience means the goal is for your thoughts to converge and to help find the path again.

Ask, “What does all the *Explore* data mean?” Challenge your rational “left brain” to let go, at least a little.

Use Of The Intuitive–Right Brain

Remember the importance of intuition, feeling, hunches, insights, “aha’s.” Make note of significant ideas. We have all had such moments.

Review your notes from the *Explore* step and try to visualize, hear and feel your Challenge/question **Cq**.

Think about your favorite songs, pictures, poems. We have found, especially with younger people, and even with older folks, music lyrics can be life-changing. “Desperados” by the Eagles seems to be timeless, as do certain Beatles, Dylan, Broadway and Country and Western songs.

Remember that there are three kinds of knowing: audio, visual and kinesthetic. At Stanford Graduate School of Business, one student did an interpretive dance to present her insight, like a mime. And everyone understood, and was moved.

Insights

There can be dramatic insights because the rational mind is challenged to listen to other voices. This hits business practitioners and students hard because they are used to reason and fact. That is why music, poetry and art examples from your experience can be so impactful.

Interpret Exercises

Conversations

The *Conversations* exercises provide a unique method to explore one's inner voice as well as the voices of others. Capturing conversations with others and with ourselves — brings out information in a new way so that we can develop a broader outlook on an issue and articulate the opinions of others even when their ideas seem to conflict with ours. Since learning seems not to happen alone but in some sort of community conversation context, take the time to explore the importance of listening to other voices than your own!

*When we think, our “thoughts are what [we are] ‘saying to [ourselves],’
...When one reasons, it is the critical self that one is trying to persuade...”*

CHARLES SANDERS PEIRCE

External Conversations

Now that you have explored the perspectives of various Stakeholders, think of the relationships as a network of conversations. What conversations are going on among and between them? Where do you need to listen more carefully? Who do you need to talk with? How do the conversations need to change for your Project to be successful?

In the *External Conversations* exercise, recall past, real conversations with Stakeholders that you recall, have forgotten or overlooked. Sometimes this reflection activates a persistent voice that was previously ignored.

And now, who do you now want to have a conversation with?

We encourage you to also seek out voices of people with whom you don't agree.

Your Inquiry work so far should be a great help in structuring approaches to have the accurately described “difficult conversation,” especially to reopen old conversations that came to an impasse.

Again, ask:

- Whom did you choose?
- Why did you choose that person?
- What insights did you get regarding our question and possible outcomes?

Habits

Your inquiry offers a unique opportunity to better understand and observe the assumptions driving the External Conversations in your Stakeholder Network.

That’s why many Inquirers consider this the most insightful and difficult exercise of the *PathFinder* process. That is because it causes them to *identify the patterns of beliefs and behaviors*; the *practices* that guide their personal — and their organization’s and other Stakeholders’— actions. Describing these habits forces questions about whether these beliefs and behavior patterns and practices are helping or hurting relative to your project and **Cq**.

Since the ultimate goal of the Inquiry is to help you make better choices, these insights into patterns of culture, thought and action help to broaden the range of formulating and making different decisions and choosing different paths.

In light of the baseline question, the *Explore* step and earlier exercises in the *Interpret* step, underlying habits relating to your question start to become clear. You can see how they have persisted, changed and evolved over time — and the values driving them.

And you now have had the actual experience to see just how you think as you reflect on your experiences. No amount of preaching can replace your own conclusions, written in your own hand.

How do these habits relate to your question or issue?

What’s the connection?


What are the consequences?

Internal Conversations

Thinking has been often characterized as nothing more than internal conversations with ourselves.

Writing a dialog script brings out information in a new way so that we can develop a broader outlook on an issue and articulate other points of view even when these ideas seem to conflict with our conscious ones.

An easy way to do that is to structure it around a conversation with yourself and someone whose advice you would like.

Begin *Internal Conversations* by looking at External Conversations and Habits and review the material developed in the Explore step. Then ask: Who would you like to have a conversation with about your project and  ?

Write down a list—think of them as your personal “board of directors.” What person—living, dead, imaginary, fictional—could give you some wisdom or insight?

Examples from past inquiries have included the founder of the company or other important figures in the organization’s history. Could you imagine yourself talking with a customer in the market or perhaps with an important wisdom figure. People have imagined conversations with Thomas Jefferson, Martin Luther King Jr., Nelson Mandela, Florence Nightingale, God, Black Elk, Alice in Wonderland, Aristotle, etc. When working on organizational issues, participants may gain insights by having a conversation with a particularly troublesome or exemplary employee or former boss or founder, e.g., Sam Walton, Richard Branson, Levi Strauss.

List several names of mentors, people you admire, or who are vital to your project, or people who can challenge you and represent a strong opposing voice.

Next, choose one person from your list and write a short description of the person in that person’s voice (e.g., “I am the founder and chairman of Quaker Oats. We were the first company to package and brand oats as a sign of consistency, quality and purity.”) Inquirers often select the founder of their company or someone who figured prominently in its history. Whoever you choose should hold the key to some wisdom about your question.

Write why you chose the person. It may be helpful to suggest how the individual handled similar problems in their own lives.

Finally, converse about the question with the person you chose and write the conversation in your Lab Journal.

Important questions to ask are:

- What people did you list as possibilities? Who “popped” into your mind?
- Whom did you choose?
- Why did you choose that person?
- What insights did you get regarding our question and possible outcomes by conversing with that person?
- What surprised you?

The power of an internal conversation is that it enables you to get to private thoughts, your own as well as those of the person you choose to converse with.

This is also a good place to get perspective on people who are causing you heartache, grief or frustration relative to your question?

Who is inspiring you or blocking you in relation to the question?

Maps and Images

Images are pre-verbal. When we work with pictures, symbols, dreams and diagrams, we imagine a situation in its entirety, including actions and the consequences of those actions, using graphic representation. Pictures remove the limited conditions of language and allow us to stay open to new ideas. In fact, a visual representation often holds pieces of the truth that words alone may not capture. This exercise activates other parts of our brains to facilitate the formation and testing the question. Sketching visuals is an integral part of the interpretation process. Once an insight is found, words can be used to translate the ideas into communication.

The simplest way to engage this level of Inquiry is to picture two states:

Now: What does your Project, Stakeholder Relationships, and your Challenge/question look, sound and feel like now?

Future: What will your Project and Stakeholder Network look, sound and feel like when you are successful?

The fullest image might include the question, needs, ideas, answers, values and action to take. But we encourage Inquirers to draw whatever “pops” into

your mind. For instance, people often will find the answer while drawing the question. Their answer may be a drawing of the perfect world. They would then draw the action required to create that perfect world and the values on which it would be based.

While an image can be as straightforward as a mapping process, it is often useful to imagine a paradox or tension and how the resolution might look, e.g., price v. quality or profitability v. volume. This is because some sort of paradox or tension drives most questions.

Songs, poems and even sounds can be very useful. At 3M, for instance, we played the sounds recorded by the Voyager space probe that had carried a lot of 3M material as it passed Mars. At first, the New Venture Team derided the music as New Age, but when we identified the source, they found great respect for the effect. In fact, one of the images of their project drawn during the playing of the eerie solar winds recording was so strong and so graphic that it was used as the central image for their successful business venture funding presentation to the 3M Board.

For team inquiries, we pass out boxes of crayons. This seems to surprise and delight executives. (We have observed senior executives looking around like kids to see whether everyone got the same size boxes!)

Think about metaphors and analogies to help spur visualization. Ships are common metaphors for companies. Paths with obstacles and roads diverging are other popular images. Pictures of values, communities, bridges and islands for companies are also common.

Some images will be stronger than others but, invariably, one will capture the essence of the problem in a way that words cannot.

External Conversations

List the people whom you recall, and whom you can call or talk with now about your **Cq**. Your questions for them should be clearer at this point in your Inquiry.

Record ideas and reactions from actual conversations (past and present).

What do others say?

What do they see?

What do they feel?

What do others say about your hypotheses?

What can you learn from their hypotheses?

(Be sure to also contact and listen and learn from those who don't agree with you or who aren't often heard.)

External Conversations

List whose advice in your Stakeholder Network you recall or whom will now seek out.

Tell them why you picked them — their experience.

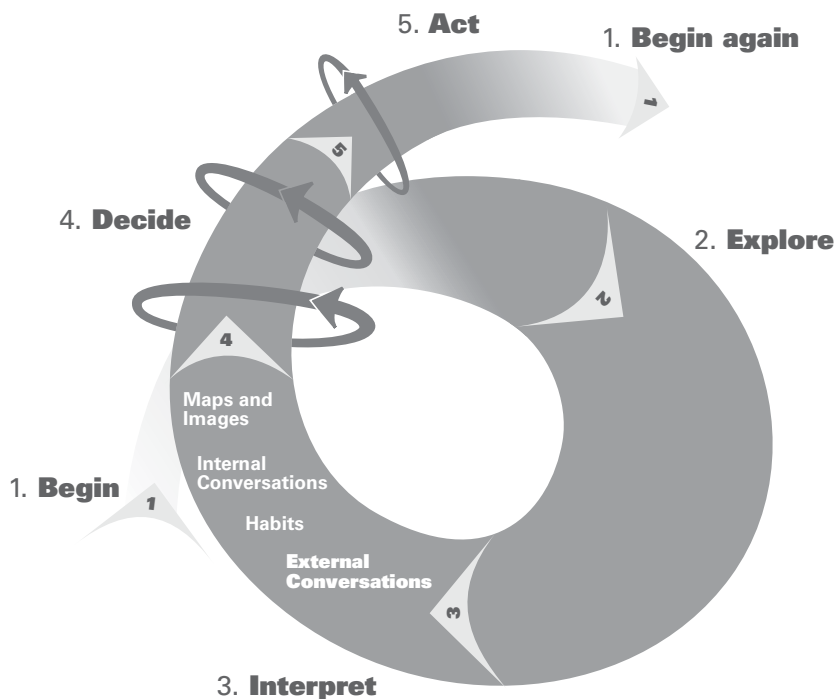
What do you remember of the conversation?

What are you going to now ask them?

Press them with tough questions.

Listen to their tough questions.

Be open to be tested by what they have to say.



Habits

Habits are evidence of values and they are a key part of organization — and Stakeholder — culture built up over time based on experience — both successful and unsuccessful!

Many Inquirers consider this the most insightful and difficult exercise of the Inquiry. That is because it causes them to *identify the patterns of beliefs and behaviors, the practices* that guide their own — and their organization's and all their Stakeholders'— actions. Describing these habits forces the question whether these values and visions and behavior patterns and practices are helping or hurting relative to the question. Are these habits sustainable?

Your Inquiry is also a great opportunity to better understand and observe your habits especially how you think.

Habits

(Some Suggestive Question Starters to Ask Yourself.)

How do you/your organization usually work in formal and informal systems — your culture?

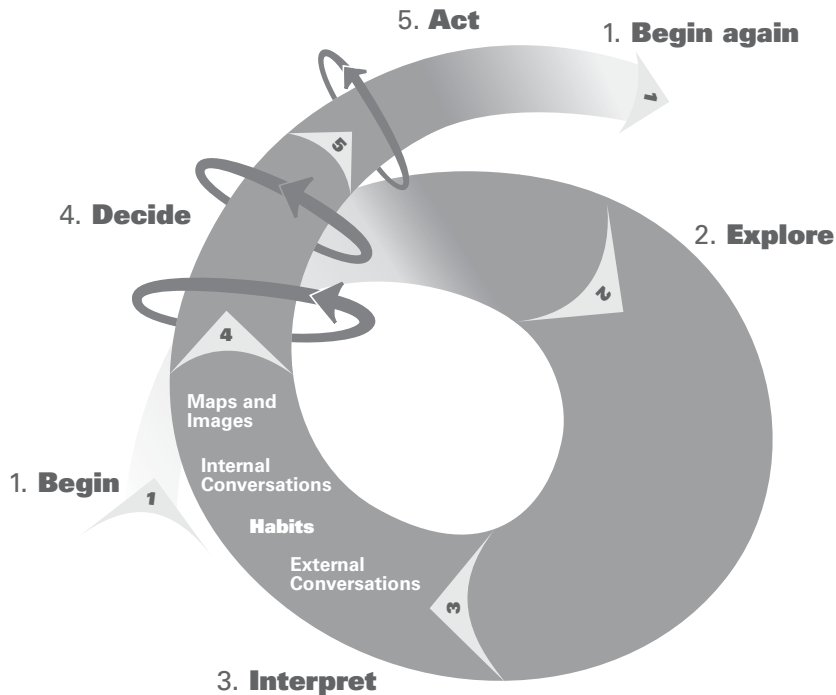
What are the habits of other Stakeholders?

What values-beliefs and assumptions-core purpose and goals are these habits/patterns based on?

Are they helping or hurting in relation to your Project?

Are these habits sustainable?

How do they need to be reinforced or changed?



Internal Conversations

Explore a different voice for other ideas and points of view to which you may not be listening. Create and write an imaginary conversation with another person whom you think can help you with your **Cq**.

Playwrights, screenwriters and novelists do this all the time to explore an idea or issue. Look at your *Maps and Images* for ideas and frameworks for Conversations.

Make a list of those people-living or dead, fictional or real — whose advice you would value now. (Think of them as your personal “Board of Directors.”) Pick one. Tell them why you chose them. Ask them your questions, listen and respond.

Internal Conversations

List those people whose advice you would like to have.

Pick one.

Tell them why you picked them — what about their experience that is important.

What are you going to ask them?

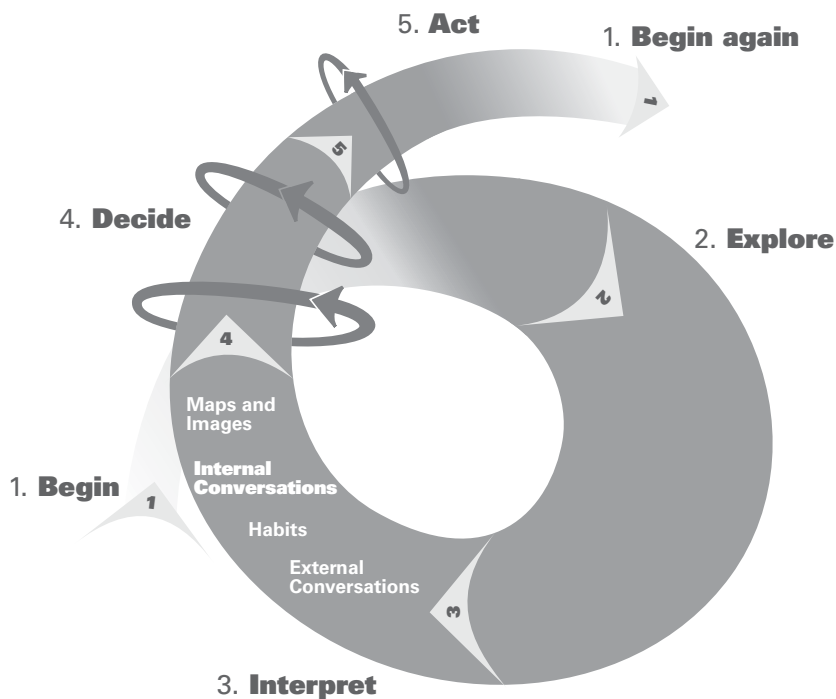
Press them with tough questions.

Listen to their tough questions.

Listen to their tough answers

Be open to be tested by what they have to say.

(Take 15–20 minutes)



Maps & Images

Use this section to break out of your verbal limitations and use more of your right-brain.

When we work with pictures, symbols, dream images, charts and diagrams, we often can visualize/imagine a situation in its entirety. The visual representation holds pieces of the truth that words alone may not capture.

Maps & Images

(Some Suggestive Topics for You to Picture.)

What does your Project and Challenge/question **Cq** look, sound and feel like now?

What is it similar to? (e.g. a poem, song, novel, character, movie or a metaphor)

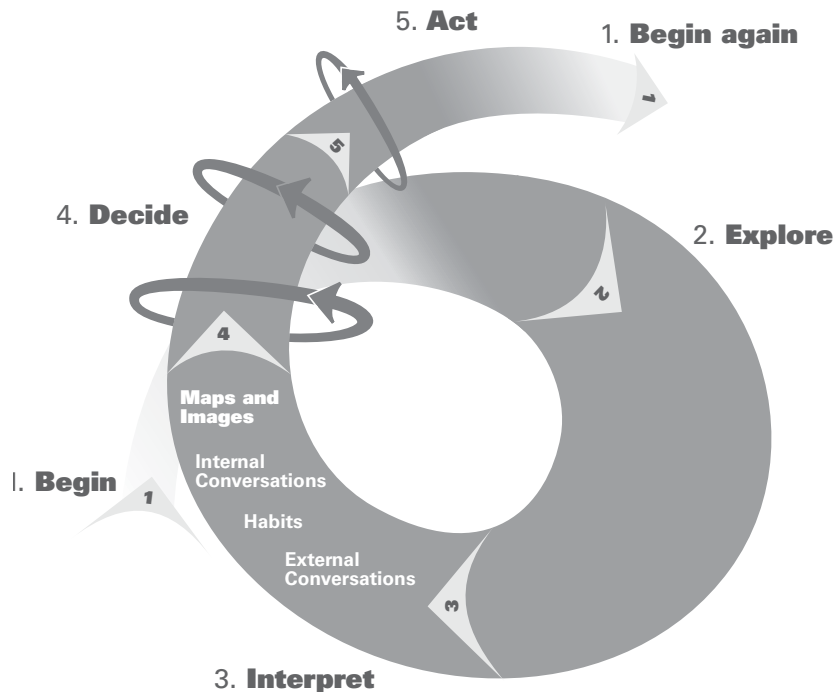
What do the choices look like?

What do your answers look like?

What do your values look like?

What does the future look like when your project is successful?

See what pops into your head?



(The answer to your question is often somewhere in the picture.)

4. Decide

Section Contents

Mindset

Overview

Hypothesize

Reviewing your answers

Re-frame/Confirming your Challenge/question

Narrative — Importance of Inquiry in

“The Context Of A Story”

Decide — Write your answer

Values — What are yours?

Compare — What have you learned?

Mindset Decide Responsibly

Consider all points of view and decide responsibly. There should be a sense of resolve, urgency and fit with your values, core purpose and goals.

(Remember that the title of the *PathFinder* Lab Journal is “*Igniting Your Values and Vision to Drive Sustainable Organization Performance.*”)

The *Decide* step is thinking, engaging the head. (Read this line again.)

- Be results driven and focused.
- Consider the impact on all your stakeholders.
- Make sustainable decisions that are consistent with your values and vision.
- Treat your decision as your best hypothesis: “don’t let the perfect be the enemy of the good”.
- Make planning and inquiry a way of doing business, not an event.
- Be sure to compare your initial *Begin* Baseline Challenge/question **Cq** and answers with your work now, and see what you have learned.

Overview Decide *Responsibly*— 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:

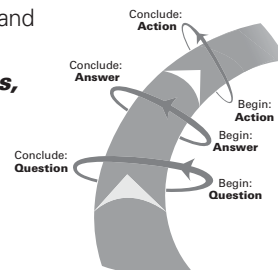
1. What is your Challenge/question **Cq** now?
2. Why is it important; its impact?
3. What is the answer to your **Cq** now?
What is the need you are meeting?
What is your idea to meet that need?
4. What values, beliefs, knowledge, assumptions, core purpose,
and goals is your concluding answer based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

Compare your conclusion with your *Begin* Baseline work.

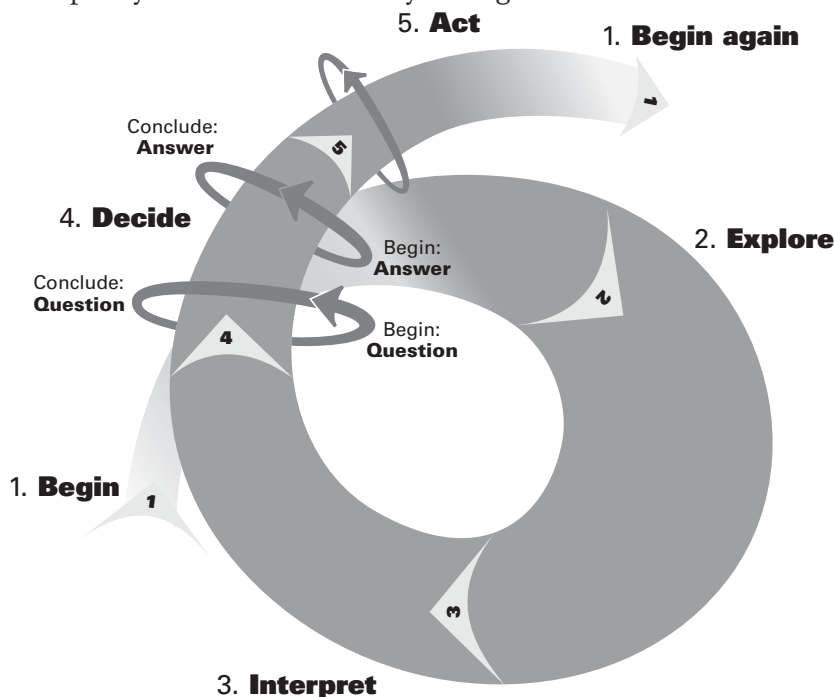
What have you learned?

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

**Questions,
Answers
and
Action.**



Decide



Decide *Responsibly*

Hypothesize

Hypothesize is an unusual word, but we believe it captures the best stance of an Inquirer. Don't treat your answer as an absolute truth. Nor keep inquiring until you are certain. Hold the decision tentatively and test it. (Don't let the perfect be the enemy of the good.) Then, almost invariably, the decision must be adjusted. This stance also reflects Jim Collins' (author of *Good to Great* and *Built to Last*) key characteristics of a "Level V" leader: "*humility and fierce resolve.*"

Reviewing your answers

Re-read-carefully what you have written. Invariably, you will have written more than you have remembered. You may start to see patterns, different use of words, or re-interpret your drawings, conversations, or facts you have written.

Re-frame/Confirming your questions

Look at your original Challenge/question again. Many will have changed their **Cq** in some way, sometimes in slight ways which cause different meanings. And some in a dramatic way, usually deepening their question to be more meaningful.

Also, look to see what perspectives you may have overlooked, and note the need for more exploring.

Narrative—Importance of Inquiry In "The Context Of A Story"

See your Inquiry as telling a story with the movement and drama that entails. (Review **II Why**) You may then see better the direction your path is going and this can give you more choices to make. You may see evidence of your "calling."

You saw in the *Begin* section that the various uses of the *PathFinder* depend on properly framing the right **Cq**. That is what engages people to begin an inquiry.

Once you are engaged in a **Cq**, you can then begin to see the question in terms of having a past, a present and a future. You can then re-interpret and draw on your life experiences.

Decide — Write your answers

Now write your answer. And feel the depth of commitment to it. Do you see it as a theme or part of a larger story, an emerging vision?

Values — What are yours?

Ask yourself: What are your — and your organizations — values, core purpose, and goals, and how are they driving your answer?

Your Inquiry will be an opportunity for you to actually see, by examining the evidence of their experience, what values are at work in you. Remember, the title of your Lab Journal is: *“Igniting your Values & Vision to Drive Sustainable Organizational Performance.”*

Compare — What have you learned?

Compare your answer now with your baseline hypothesis — What have you learned?

Now see what has changed for you. Compare your question and answers now, with your *Begin* Baseline work. This interpretation and understanding of your evidence (signs) through pragmatic inquiry is the act of learning. There is often a shock to see how far you have come in gaining insight.

“Writing not only clarifies what you already know; it is also an astonishingly effective way to learn something new.”

DANIEL BOORSTIN

5. Act

Section Contents

Mindset

Overview

Key Objectives

Action, Communication, Courage, Measurement,
Begin Again, Conclusion

Mindset Act Courageously

The crucial step of *Action* ignites your decision.

Make plans and set goals, metrics and milestones. The steps leading up to the decision as written in your *PathFinder* can make a compelling story to engage others.

The hard work of the Inquiry — as you reflect on the evidence of your own experience — will give you the courage to keep you moving in the face of the unforeseen and huge obstacles which are sure to arise.

BUT, remember that you are “testing” your decision. Treat it as an *Hypothesis*.

- Lead collaboratively and with conviction.
- Demand clear accountability.
- Manage and measure against milestones, commitments and stakeholders.
- Plan for contingencies; respond quickly.
- Tolerate mistakes and learn from them.
- Recognize and reward superior performance.
- Have fun.
- **Begin Again**

Overview 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?

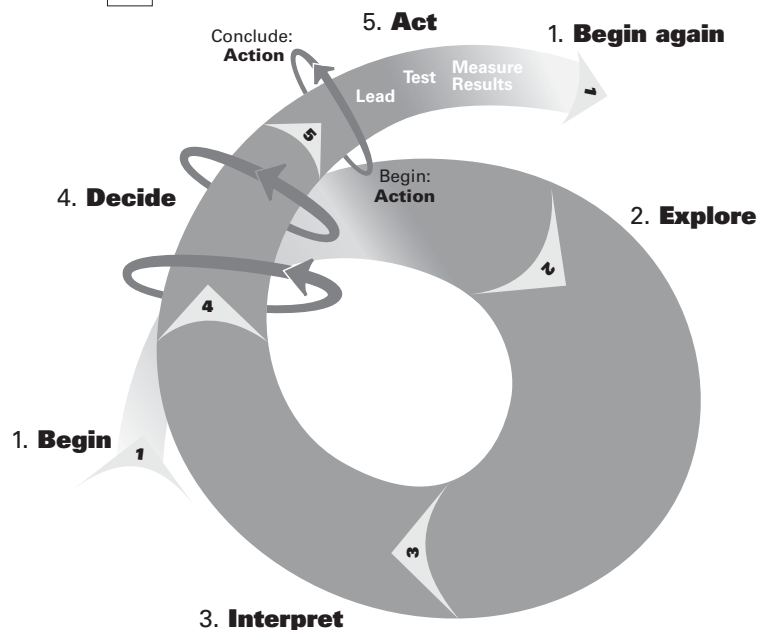
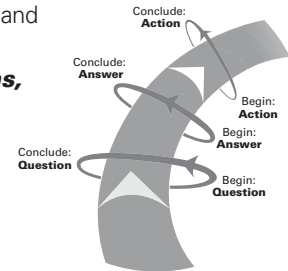
Begin Again

What are your Challenges/questions/etc.? What needs will you meet?
What are your ideas? What are your Actions?
What will your new **Cq** be?

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.



Key Objectives Act *Courageously*—The Path Ahead

Igniting Your Values and Vision to Drive Sustainable Organizational Performance

This phrase, from the cover of your Lab Journal, states the key benefit and defining feature of *PathFinder* Pragmatic Inquiry: Decisions have consequences in action. Something must be done. And the evidence and reasons for the decision/hypothesis are now clear.

Action from Decision

Therefore, at this point in the Inquiry, the action steps are often immediately apparent. That is because the essence of the Challenge/question **Cq**, the need, the ideas and the assumptions on which they are based, the evidence and their interpretation are all documented. It now becomes an *if-then* proposition, i.e., “*if* this is true as best we know now, *then* this is the action we need to take.”

As a result, action steps in a Pragmatic Inquiry should, and usually do, flow very quickly.

Communication—Enlist Others—Trust

The Inquiry can now be seen and told as a story — a narrative — one in which you and others now see themselves as a part. You have a way to explain to others the decision you have made and why. There is a truthfulness in the evidence and the *Interpretation* which builds trust — the foundation of leadership. Others know that the Inquirer has thought about the **Cq** and has a plan, and they can examine the logic and the evidence for themselves.

Courage

When a decision is made, then the real test begins. Others will disagree with the decision. Competitors will attack. Obstacles will arise. But now the Inquirer has uncovered the truth and is fortified by this. For many, as they face the inevitable challenges in acting on their answer, their Inquiry work is a constant reminder of their values, core purpose and goals.

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.

Begin 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.

Conclusion—What is learned

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 Begin 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 and habits.

As John Dewey has said:

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

There is a quote etched in the wall of the Allen Center at Kellogg School of Management, home of their world-renowned Executive Education programs which states:

*“No single thing abides but all things flow.
Fragment to fragment clings;
the things thus grow
until we know and name them.
By degrees they melt, and
are no more the things we know.”*

LUCRETIUS
99–55 BCE

Therefore, now embrace with enthusiasm — and new wisdom — the next step:

Begin Again

What is your revised/new **Cq** ?

