

The Merlin Advantage

Rediscovering the
Leader's Greatest
Ally

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The wisdom from above is first pure, then peaceable,
gentle, open to reason, full of mercy and good fruits,
impartial, and sincere.

– James 3:17

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INTRODUCTION

The great problems of our time are not technological, for these we handle fairly well. They are not even political or economic, because the difficulties in these areas, glaring as they may be, are largely derivative. The greatest problems are moral and spiritual, and unless we can make some progress in these areas, we may not even survive.

– D. Elton Trueblood

Cholesterol. For many of us, the word quickly evokes feelings of avoidance and maybe even fear. Cholesterol is widely known as a silent killer, lurking behind some of our favorite foods and gravest health concerns. It's not like Cyanide, though. We know eating a cheeseburger won't kill us on the spot. It's the cumulative effect we worry about. Regardless of which medical theory you subscribe to, there is something unsettling about a substance that builds up without symptom or signal for years, only to

sound sudden alarm bells after a physical exam – or an actual emergency.

Organizations face a similar risk factor. Organizational cholesterol is a threat to the figurative heart of companies, institutions, schools, cities, and even nations. It is the cumulative result of unresolved interpersonal tensions, misunderstandings, and emotional injuries incurred in the pursuit of economic, social, and political gain. It stems from missed opportunities for ethical behavior, deep insight, and adept navigation of complexity. It is the hidden, silent killer of engagement, morale, teams, initiatives, and sometimes even whole enterprises. Organizations don't just collapse. Shocking headlines, mass layoffs, waves of turnover, and dramatic scandals always originate months, years, or decades earlier.

Like its cardiovascular counterpart, organizational cholesterol is frequently overlooked, minimized, and ignored. Its long-range risk is obscured by more pressing, day to day "realities." No one ever says, "I'm going to take the day off because my cholesterol is really building up." We say, "I'll deal with it later," or "I better stop eating these at some point." We even attempt to justify our avoidance by noting, "Doctors can't even agree on whether or not eggs are bad for you." Despite a very normal tendency to put off the cholesterol conversation, it needs to happen – for your heart, yes, but in another sense, for your organization, and our society, too.

We will return to the cholesterol analogy now and then as we explore the surprising theory of Integral Process Leadership (IPL). This medical analogy will likely grow in its poignance, too. You likely already believe that our modern world has a social-emotional-spiritual heart condition, and that new treatments are needed. For now,

though, I want to lay out the conceptual roadmap of IPL theory and set the stage for a new conversation about why engagement lags, why millennials leave jobs so readily, why scandal erupts, why bosses derail, and why a host of other organizational, social and political challenges persist – and, of course, how we can improve things. Here's the overview:

1. Hidden and undiagnosed interpersonal conflict and complexity drains organizations and society of revenue, talent, morale, engagement, agility, foresight, and sustainability; creating serious, hard-to-detect organizational risk.

2. Traditional leadership and organizational approaches favor predictability and control and often lead to harmful, maladaptive responses to interpersonal conflict and complexity – even when politeness, friendliness, and gregariousness are measurably present and emotional intelligence is formally espoused.

3. Traditional leadership approaches are necessary for technical-functional results but insufficient for successful and sustainable navigation of interpersonal complexity.

4. The interrelationship between complexity, organizational effectiveness, leadership and interpersonal dynamics has been known to researchers and thought leaders for decades, but successful application of these insights have, thus far, been of a quantitative-technical (Qn/T) nature, leaving many leaders and organizations still missing a meaningful paradigm shift despite having heavily invested in leadership and organizational development.

5. Qualitative-adaptive (Ql/A) approaches that release traditional controls and favor transparency, dialogue, and collaboration are critical to sustainable high performance

but difficult to practice authentically and sustainably for most traditionally selected and trained leaders.

6. Integral Process Leadership (IPL) operationalizes QI/A work by leveraging strengths and personality-based collaborative leadership, applied principles of positive psychology, neuroscience and emotional intelligence to support sustainable performance and organizational effectiveness.

In more casual terms, we might say organizations have long-standing problems when it comes to creating and sustaining healthy human systems of work. And, though we know there are better ways of doing things, organizations struggle to enact actual real change, instead doubling down on traditional leadership models and training. Without a new perspective, organizations will continue to suffer from a covert and dangerous imbalance of competitive energy. Headlines will continue to reveal problems at the top, good people will continue to job hop, the environment will suffer, and anxiety and high blood pressure will keep increasing.

Few people can spot the actual agents of organizational destruction at work. It's much like driving by a fast food restaurant and trying to observe heart disease occurring. It just looks like happy people eating. Even when I sit next to clients in consultative settings and point out organizational contaminants in real time, it's still hard to see. Nonetheless, the poisoning from diminished interpersonal synergy is happening every day. It's happening when someone hesitates to include another person in a conversation. It's happening when someone rolls their eyes in a meeting, or when someone holds back an idea from the boss. It's happening when someone else holds back praise or a simple courtesy. These are the cheeseburger bites. More intense

passive aggression, deception, betrayal, isolation, intimidation, and Machiavellianism lurk immediately below the surface. These toxins are present every day in work, school, legal, and political settings. They are the extra helping of onion rings and ranch dressing, and they add up.

Come on, you might be thinking, don't tell me this book is going to hang its hat on people's feelings not getting hurt at work. Truthfully, yes and no. The negative interpersonal phenomenon I just mentioned are just the evidence of an elusive, unresolved disintegration of the vital, but underappreciated, relational foundations of most human systems. I understand the desire for a more complicated diagnosis, though. We want something more technical or tangible to explain the breakdowns in our organizations, institutions, and workplaces. Nonetheless, it is the relational substrate of the universe that holds the answer to next level leadership and organizational effectiveness. More striking, though, is the primary assertion of Integral Process Leadership that unlocking the relational drivers of organizational health cannot be accomplished by traditional leaders and organizational design.

As you read on, the danger and absurdity of current models will become more obvious. Despite incredibly effective business models, elegant PR machines, and deeply compelling marketing approaches in action today, we know something isn't right at the heart of our economic, political and social structures. It will also become increasingly clear that the solution involves a radical paradigm shift. Get ready, though. Old habits die hard. It will take some time for new thinking to make sense. It will require real perseverance, and like family systems therapy, it will require courage to see through old routines, lenses, and behaviors that define "the way things are."

Ironclad social conventions such as “being professional” “polite” and “not taking things personally” protect an old system and hide the real killers of teamwork, transparency, engagement, culture and trust. Even well-intended, formal interventions may inadvertently bury the truth. Sometimes it’s bringing in a great training, sometimes a new policy is rolled out, and sometimes personnel changes are made, but when root causes of organizational cholesterol are not addressed, the slow, arterial squeeze continues – no matter how strenuous, trendy, sophisticated or fun the avoidance strategy.

The tricky part is that early detection and mitigation of organizational cholesterol problems requires proficiency in a language most leaders do not, and as I will show, cannot speak fluently. Because the secret language of organizational health is foreign and difficult, misdiagnosis and breakdowns occur. It is like aid workers in a far-away country trying to tell a local tribe about a threat for which the tribe does not yet have a suitable word. “Close enough” words may be attempted, but they fail to accurately describe the real risk. Organizations do the same thing. When problems develop, they speak in their native tongue which is rooted in cultural inflections of profit, performance, competition and technical thinking. They point, gesture, and apply language that is familiar and feels like insight, but isn’t.

When inevitable tensions build or problems develop, attempts are made to control damage, pivot quickly, and carry on. Scapegoats are found. Sometimes it’s the wrong program, or maybe the wrong team. Maybe too little funding, or too little oversight, or too much oversight. In the infamous NASA Challenger tragedy, bad O-rings were blamed for a fatal launch catastrophe. Most people know it

was not ultimately about bad O-rings.¹ Still, through very common, self-deceptive mechanisms of organizations, few people at the time knew what the problem really was, and far fewer could do anything about it. Bad technical outcomes are always downstream from the incredibly complex domain of human, social-emotional interactions. Integral Process Leadership theory suggests elusive culprits such as long-standing tension, mistrust, and miscommunication are common. Situations like the one at NASA are exacerbated by the absence of fluent interventionists who naturally leverage qualitative-adaptive insights and approaches to surface discrepancies, as well as solutions.

Like toxic, physical cholesterol, a significant accelerating factor is the absence of good cholesterol. This is where IPL puts forth its boldest premise. Historic and persistent problems in leadership and organizational development are not primarily caused by under-developed leaders, rampant narcissism, the wrong coaching, or any other trending HR/OD/LD diagnosis du jour. Organizations are out of balance. Like a car with out-of-balance tires, the whole system has problems regardless of the quality of the individual tires. Balance, for our purposes in this book, is not some sort of static ratio. Natural phenomenon like human respiration, magnetic poles, cosmic light and darkness and a host of other vital polarities remind us that balance is an ongoing rhythm. It is also dynamic, like surfing or staying in tune while playing music. It requires constant attentiveness and response. IPL is a unique approach to a similar system balance, and it has little to do with AI, data analytics, development competencies or complicated programs.

¹ Siddarth, Raval. Sept. 8, 2014.

Integral Process Leadership proposes a theory of personified, good cholesterol and how to translate that to real world advantage. It is also the path to repairing the tears in our larger social fabric. The value proposition of Integral Process Leadership is that organizations who activate and release the new Merlins will win the talent wars with no gimmicks and no expiration dates. They will win by genuinely boosting engagement, enhancing employee wellness, spending less on leadership development, enjoying loyalty from employees when the chips are down, outlasting other competitors, and wasting exponentially less time, money, and energy on unnecessary conflict, turnover, and change. That is the Merlin advantage. Like ADA approved toothpaste, future job seekers will learn to look for organizations with it.

I invite you to have some fun with this book. While IPL theory has the potential to be provocative and disruptive, discovery and playful imagination are the intended mood. In the pages ahead you will read about magic, myth, HR, neuroscience and many other things that do not often appear together in the same conversation. You will read about lost wisdom usually told as only fiction but as real and relevant as ever. Some of this will be surprising and yet, some of it, deeply familiar. We will begin with theory and philosophy, but quickly move into to the practical approaches and specific path to implementing IPL in real organizations. Here, the weathervane turns.

THE MERLIN ADVANTAGE...