



## Consulting Maxims for Co-creating Sustainable Futures

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### Abstract

This article provides practical insights and experiences on universal consulting maxims for co-creating sustainable futures. For many years, Western cultural and educational traditions led to a view that consultants are experts and solution-providers. In recent years, this mind-set has shifted towards more collaborative and transformational approaches, especially amongst Western Organisation Development ('OD') practitioners, and those senior leaders interested in transforming their organisations. In the experience of the authors, the perception of the consultant as an expert solution-provider continues to linger, particularly in Africa and the Middle-East. Using case studies from our OD consulting practices, the authors emphasise practical techniques for transformational consulting during unsettled times, and illustrate the universality of a more collaborative and transformational approach to address organisation issues world-wide. The distinctive qualities evident in these maxims include collaborative engagement and co-creation of interventions with people in the client-system, attention to inquiry and effective engagement, amplifying human development and participation and, finally, systems thinking. The article seeks to provide insights that help consultants and organisations to see more clearly and implement practical approaches to complex and 'wicked' situations in order to harness the expansive world of possibilities. The article's submissions are founded on the fundamentals of OD, particularly behavioural science knowledge, and the OD field's dual identity, premises, pillars and values. These apply widely in all contexts, drawing upon such theories and practice areas as Otto Scharmer's 'Theory U', Gestalt OD, systems thinking, process consulting, and consulting with integrity. The authors posit that consultants see the pressing need of all organisations - private, public and third-sector, multinationals and SMEs - for professional help. The consulting space is fast expanding. Now the challenge is to influence clients to experience the value of transformational and collaborative approaches, and work with us in partnership rather than expecting expert solutions. What can we, as consultants, do to help? What are some of the fundamental principles that guide us in helping client-systems create sustainable futures for themselves in these turbulent times?



## Introduction

"I'm so relieved I retired before the pandemic hit us," an ex-client, regional Vice-President of a major multinational, related in mid-2021. As a highly experienced international executive, with a deep understanding of his organisation, its markets and environment, he thought the management challenge would be massive in a landscape evolving so rapidly and with such unpredictability. Organisations have always had to manage in unsettled times, to resolve different points of view, cultural perspectives, diversity issues, power struggles and tensions alongside the short and long-term business challenges. Now we must add to these a global pandemic, climate change, shifts in attitudes towards work and work-places, the world-wide political landscape, clashes of values, structural inequalities, advances in AI, speed-of-light communications and peoples' enhanced opportunities to communicate alongside the darker side of anger and righteous indignation, all of which contribute to a recognition that what worked in the past may not work now. As consultants we see the pressing need of organisations for professional help, and the consulting space is expanding. The challenge is how to influence clients to experience the value of transformational and collaborative approaches, and work with us in partnership, rather than expecting expert solutions. What are some of the fundamental principles that guide us in helping client-systems create sustainable futures for themselves in these turbulent times?

The mainstream literature often positioned consultants as experts, as solution providers, influenced to a large extent by Western cultural and educational traditions which emphasised rationality, logic and theorising about people and situations. This, however, is changing, and particularly for OD practitioners who are learning not to over rely on intellectual processes, and to pay attention to other sensations and ways of perceiving. The people of the world do not all think in the same way.

In a changing world, a good consultant can help organisations to see more clearly and implement practical approaches to complex and wicked situations in order to harness expansive possibilities, adopt new ways of working, and sustain dramatic improvements. However, change efforts often fail, no matter how well-intentioned, because of the inability to appreciate that to transform a system means transforming the relationships among people who shape the system.

This article focuses on ten aphorisms for transformational consulting, derived from the field of OD. These maxims enhance the client-consultant experience while tapping into the system's collective capacities.

### Maxim 1: 'Start where the system is' while 'putting people first'

When working with clients, our purpose is to enrich the ability to explore possibilities, see a wider set of choices, and bring to their conscious awareness how those choices

impact the effectiveness of the system. This requires an appreciation of systems thinking and why it matters. Peter Senge says "*Systems thinking is a framework for seeing interrelationships, rather than things, for seeing patterns, rather than static snapshots. It encompasses a set of general principles spanning fields as diverse as physical and social sciences, engineering and management.*"<sup>1</sup> We would also add the field of philosophy, which deals with ethical questions all of us face, in organisations and in our personal lives.

It may be counterintuitive but be aware of becoming too focused on talking about 'system' issues too early. Herman and Korenich<sup>2</sup> point out it is too easy to end up in vague, abstract conversations with little connection to reality if people are not talking to each other as fellow human beings. If you are truly curious about, and interested in, how people experience their work challenges and frustrations, you will get an in-depth appreciation of where the system 'is'.

Having a systems view is a distinguishing characteristic of an OD approach, reinforcing the need for consultants to approach clients as humble learners rather than bearers of preconceived notions and prepackaged approaches. A systems view helps consultants to understand and appreciate the dynamics of a client-system. To be effective, consultants should be curious, amplify inquiry and engagement competencies, and pay attention to four elements (events, patterns of behaviour, system inter-relationships and mental models<sup>3</sup>), and help the client become aware of them too.

Let us use a simple example to amplify how a good systems thinker uses these four elements operating simultaneously. In a large, international, technologically complex programme, the client was experiencing schedule delays, cost over-runs, and unacceptable trade-offs between quality and cost. The client, an international organisation, wanted a meeting with its suppliers – a prime contractor and main sub-contractor - to examine their relationship and to try to resolve difficulties jeopardising the programme. Firstly, the 'event' was a tri-partite meeting of sixteen key individuals from all three parties. Secondly, patterns of behaviour were evident from the start, with everyone behaving opportunistically. The customer thought the suppliers had submitted an unrealistic bid, oversold their capacity and were re-assigning staff elsewhere; the suppliers saw the customer's behaviour as 'holding their feet to the fire', hitting them with penalties, and adding new design elements without consultation. Furthermore, the relationships between the three organisations (the 'system') were antagonistic and defensive; conflicts broke out and a blame-game was in full force. Finally, the 'mental model' the client had was that it was *their* programme and the suppliers needed to deliver what they had contracted to do. The suppliers' 'mental model' was that of being equal partners. The suppliers knew their technological capability and resources were needed because the client had gone to the market to acquire them. None of the parties recognised the need to concentrate on shared interests, mutual problem





solving and clear communication if they were to avoid this opportunistic behaviour. The consultant's job was to design interventions so that the system became evident to all. All sixteen people needed to pay attention to the programme through 'peripheral vision'<sup>4</sup>, the ability to pay attention with a wide-angle lens, and to see how their actions were inter-related, so they were able to identify more effective mechanisms for resolving conflicts and converging more quickly on action plans.

It is critical that clients are able to integrate different mental models into a shared understanding of the 'whole' rather than having a fragmented view. Through effective inquiry and engagement, the consultant can facilitate generative conversations to illuminate blind spots and build trust with everyone in the system. While the consultant should be a facilitator, as well as a critical observer, they need to enrich the client's ability to see the system of which they are a part.

### Maxim 2: If you know 'Step Two', it is not OD

Our first maxim emphasised 'starting where the system is'. An organic way of thinking about it is to imagine a river running its course. Is it causing flooding downstream or depleting wetlands? Is it blocked? If so, how? Does it need major engineering work or more localised interventions to refresh and revitalise it? Staying with the analogy, the consultant needs to build first a strong, inventive circle of people who know about rivers, land management, ecology and other disciplines, alongside those who use and live on the river, to create a coherent, collaborative network that works together, co-sensing and co-creating new possibilities and solutions.

A public sector organisation in Afghanistan asked for consultancy support in applying an OD lens to the Human Resources ('HR') Directorate and, not unusually, expected consultants to bring pre-packaged solutions. Our key challenge was to help senior leaders reframe their mental models of consultants as experts towards seeing us as partners to co-create the design of an HR function through people, processes, procedures and systems. Two internal staff partnered with two external consultants, one in Zimbabwe, the other in Abu Dhabi. The internal members provided knowledge of the system dynamics, key players, and their readiness and capability<sup>5</sup> for change; the external consultants provided the expertise on how to engage everyone in the client system. Together they worked towards creating a coherent network of people (the 'process owners') willing and able to work collaboratively. Process owners from five departments (*Structure/Tashkil, Training and Capacity Building, HR-MIS, Recruitment, and Health and Employee Relations*) kept the process grounded and co-created possibilities and solutions. As themes emerged, the consultants assumed a facilitation role - an iterative process of expanding the collaborative network, agreeing approaches and plans, identifying emerging themes, and ultimately co-creating the solutions.

This kind of OD approach is different from other change approaches: the consultants needed to leverage the

whole client-system to co-create sustainable interventions, rather than applying predetermined solutions. The client-system knows its business, and the OD practitioner's job is to incorporate the collective wisdom of the whole organisation, thereby helping individuals to take personal and collective responsibility.

### Maxim 3: Create space to manifest the 'wisdom in the room'

The OD field has a dual identity - the science of change and the practice of changing - hence the significance of inquiry and engagement. As the consultant assembles a circle of willing and able people, it is important to create space for everyone to discover the new, rediscover their potential, and deepen their sense of ownership in the client-system. We need to ask perceptive questions, listen acutely to the responses, and engage them fully.

Harnessing the wisdom in the room underpinned the design of a large-scale, region-wide meeting of eighty senior technical managers in a large multinational organisation in the Middle East. We worked with a team to design the two-and-a-half-day event. In pre-planning interviews with one-third of the participants, many offered a 'solution' to the issues underlying that year's meeting. We created a list of actions from those suggestions, and the Regional Vice President presented it to open the meeting. With the design team, we created a meeting-design that included three major components:

- Ten 'home-groups' with a 'max-mix' of technical expertise, role, geographical location and gender, ensuring a 'microcosm of the whole';
- Fifteen respected, expert topic-group leaders who served as resources to the home groups;
- And, finally, a design that accentuated taking responsibility for sharing all information.

Members of the mixed home-groups spread themselves among the topic sessions in a series of three rounds, each round encompassing five topics. Following each round, members reported back to their home group for a one-hour sharing session, briefing the others on what they had learned. For the final half-day, the entire meeting met in plenary, with the ten max-mix home-groups proposing revisions, additions, enrichments, to the original action list before a final test for the agreement of all participants. The consultant's single role was to coach the meeting leaders and discussion hosts, and to keep an overall eye on the flow and process of the meeting itself, including making sure groups always had what they needed. Collectively everyone shared the wisdom in the room.

To release the wisdom in the client system, a consultant must know when to speak, when to listen, and when to provide the support required. The consultant must be prepared on occasions to cede the facilitation role to the client, stand back and keep an eye on the 'whole', and coach the client from the sidelines.



#### Maxim 4: Create space for the new to emerge

Consultants need to move away from telling clients what to do. Kathy Dannemiller's philosophy that consultants do not always have the right answers, but do have a belief that "when people are treated like adults, are well informed, and asked the right kinds of questions – it does feel like magic to see how far they can move and how much they can accomplish"<sup>6</sup> provides us with a key lesson. Otto Scharmer's Theory U<sup>7</sup> is further corroboration with regards to co-initiating, co-sensing and co-creating. So, a more useful consultancy role is to create the opportunities for the whole system to see and talk to itself, about the business *and* the culture in which it operates. Every change initiative requires the consultant to help the organisation create psychologically safe spaces and new ways for people to engage in generative conversations *continually*. The consultant facilitates the process to create the readiness for desired change and a wider sense of ownership.

As an example, our firm was engaged to facilitate a twelve-week 'Management Development Programme' in Nigeria, targeted at six managers of a 'value-added services' firm. Rather than proposing something off-the-shelf, we worked with the client to build a common picture of where the organisation was 'right now' (in terms of management development and business need) and explored designed, co-created and delivered a bespoke curriculum, and evaluated its impact together. Working closely with the Senior Leaders, we facilitated conversations with, and between, the different stakeholders, gathering data to 'feel the pulse' of the organisation. We had discussions with previous corporate trainers and consultants and others who could enlighten us on the company and its culture, and facilitated the co-creation process to deliver a '*Management Development and Corporate Award Programme*'. To further ensure diverse perspectives, we assigned three facilitators from South Africa, Kenya and the United Arab Emirates to help with implementation and, as the programme was rolled out, ongoing support.

This example provides a demonstration of the process of co-creation by tapping into the collective capacities of people to renew or re-energise a culture. As always, context is critical, and the involvement of all key stakeholders kept the focus on both the culture and the business need.

#### Maxim 5: Use Self as an 'instrument' effectively

Much has been written on the 'Use-of-Self', stressing the importance of consultants using Self as an 'instrument' effectively when interacting with a client-system. Otto Scharmer's<sup>8</sup> Theory U is a useful practice-orientated tool acknowledging the need for people to dissociate themselves from habitual ways of thinking, and open their minds to new and different thoughts. Scharmer postulates that people in organisations get stuck in their institutional thinking with respect to all manner of global issues we face today. Jiddu Krishnamurti<sup>9</sup> also offers the insight that

"we stop ourselves from truly seeing or listening because we are overburdened with our own problems, beliefs, or the past".

The practical lesson for consultants in the Use-of-Self is to be fully conscious, observant and present. Consultants need to behave with integrity, and 'practice what they preach' in the way they behave together, and with the client. This requires awareness of our biases and predilections, understanding that our own habitual or fragmented attention may lead us to stay within our own comfort-zone and to force-fit solutions. We need to avoid falling back on theorising or intellectualising as a way of avoiding issues we find hard to address personally. We need to be a gadfly and challenge the status quo, pose novel and even disturbing questions of ourselves, and encourage the client-system to do the same.

In many ways, an effective OD consultant is a role model, demonstrating effective skills so the client can observe and engage with different ways of being together and working through the issues they face. Understanding how we impact the organisations we work with involves an ability to look critically at ourselves, and to know that we do have an effect, and that we are aware of it.

#### Maxim 6: Hold up the mirror

If we are to use our own self-awareness consciously, we also hold up the mirror for our clients. People often have a problem-orientation, and clients expect, indeed often demand, action lists, measurable results, or decisions as a part of many interventions. This is a conundrum because the work that really needs to be done requires *them* to reflect on what they are doing and to shift their mindset towards new ways of thinking, and seeing possibilities rather than fixed solutions. Too often these action lists do not take a broad enough view, and can be hard to implement because of a lack of ownership. Helping the client see the issue from multiple perspectives while reflecting on diverse views in their system and culture is an important role. It is not always about the report of the 'oracle' where the consultant tells the organisation what they think of them. In our experience, this is not a useful process. What is useful is to handle feedback as another opportunity for engagement and exploration so clients gain an appreciation of how their and others' actions interrelate. Peter Block<sup>10</sup> points out that a client's responses provide us with important data about how the organisation handles its decisions.

There are a number of methodologies that can be used to 'hold up the mirror' and aid reflection. For example, an 'After-Action Review', adapted from the American military, is a professional discussion about an event or a project. There is a focus on performance standards or clearly defined outcomes. The facilitative role is to keep the discussion focused on facts and the data. Each person tells their own 'story', taking events chronologically - what happened and why, assumptions they were making that formed their personal perspective, what could have been done differently, and what needs to be considered



for future projects. Smith and Kouchaki<sup>11</sup> suggest incorporating discussions about ethics into the after-action review process, exploring questions about alignment of values and codes of conduct, the crossing of ethical lines, and undue harm to stakeholders. This learning cycle forms the basis of any new phase or project, ensuring the end-to-end process works as effectively as possible. Furthermore, explicit discussion about ethical dilemmas offers an additional opportunity for deeper understanding and more conscious awareness of the choices made.

Other interventions can be 'playful' and particularly useful for things that are hard to talk about or are avoided. We used 'playacting' with one multi-national client headquartered in the Netherlands where it was clear things bubbling beneath the surface were impeding progress on a transformation process. We needed a safe way for these to be brought to conscious awareness. We identified a number of cross-cultural children's stories, provided props and costumes, and invited groups to write and perform a short play that reflected the 'undiscussable'. As each play was performed, all participants captured the common elements of those 'undiscussables' to use for conversations later in the meeting.

Seeing things in a humorous light helped with finding a way to confront things that had been too sensitive to speak about openly and provided a mechanism for good generative conversations. We offer one caution, however: as a consultant you need to have developed a solid trust relationship for this to work effectively.

### **Maxim 7: Have a good 'tool-kit' and use it lightly and with resilience**

A good tool-kit augments our capacity to use Self as an 'instrument'. We must have the knowledge, confidence and resilience to draw on models, theories, methodologies, meeting designs and approaches, to find the one that will best help the process. We must be aware that, especially when things get emotional and we experience discomfort, we may pull out something familiar, a model that seems rational, and grab at it like a life vest. Having a good knowledge of frameworks, theories and so on is critical, but we must avoid getting trapped in them, explicitly or unconsciously. This can distort and filter our thinking. So, from time to time, learn to trust your instincts, pay attention to other sensations, and put the intellectual process on hold for a bit. Trust that something useful will occur to you when you need it. This will only happen if you are paying attention and are willing, personally, to stay with some discomfort and ambiguity for a time. And, of course, have a good knowledge and experience base to draw upon.

Our final caution is that consultants do not need to use overly complex models and theories; the work is complex enough without adding to it. The effective use of a simple tool trumps the use of a poorly understood and unnecessarily complex tool every time.

### **Maxim 8: Use resistance to change to co-create sustainable value**

Peter Block<sup>12</sup> asks the question, "What are clients resisting when they are resisting us?" Block says it is not that clients are not smart enough to solve a problem, but that they are unable to see it clearly. There is always some anxiety when an outsider is asked to help. In difficult circumstances, people get stuck, fear making waves, lack confidence, and worry projects will go sour or provoke repercussions. However, resistance does have value in any change initiative. It can help to illuminate blind spots. An experienced OD consultant will see and use that resistance as energy to be channelled for the benefit of the client-consultant relationship. It is a sign of engagement. It creates an opening for a dialogue about the realities of the organisation and how its members can be helped to implement coherent strategies and plans to address those realities.

It is important for the consultant not to take resistance personally, but to try to understand the underlying concern. Block says the client is generally concerned about control or vulnerability. He observes that control is the coin of the realm in organisations, with the system geared towards maximising it. When we encounter resistance, it may be because the manager feels they are about to lose control. Block points out that organisations are highly political and competitive systems. Politics is the exercise of power, and he cautions us to be aware always of the possibility that we may be disturbing the political equilibrium unintentionally. A deliberate act to address the dysfunctional use of power will only be successful if the client knows and understands that this is the purpose and is willing to engage with it.

It is, however, worth remembering that the founder of psychoanalysis, Sigmund Freud, is supposed to have said, when asked whether the cigar he was smoking was a phallic symbol, "Sometimes a cigar is just a cigar". Just because, Block says, a client does not always want to do what you suggest, it does not mean their objections are resistance. The client just does not want to take your advice.

### **Maxim 9: Leverage technology for cultural and organisational transformation**

Technology can bring significant advantages to consulting as we can use it to explore, exploit and build collaborative networks. Patrick Trottier<sup>13</sup> posits that, to build collaborative networks and enhance transnational consulting, effective use of technology breaks down isolation, disengagement and traditional hierarchical structures. In terms of emergent thinking, Trottier also observes that "through technology such as IT/IS/AI pattern interfaces, one may begin to conceive of the realm of potential human capability. Such may also give a unique 'human experience' to such connectivity". However, we need to ask the question as to whether existing technologies are aligned with what OD stands



for in terms of cultural and organisational transformation. For example, are platforms like Zoom or Microsoft Teams effective in supporting interactions with clients? We hear often from OD practitioners who cite frustrations about the limits of technology to manifest connection, integration, collaboration and engagement. It is not enough to be able to adapt to existing technology; we need to take a lead in its design. Consultants need to understand not only how to read 'dashboards' but to leverage their unique skill-set to inform the design of technology platforms that facilitate cultural and organisational transformation.

Consultants should help clients to develop interfaces that support and augment their ability to process and use information for greater understanding, improved decision-making and strategic influence, enabling them, thereby, to adapt to changes in the internal and external environments.

### **Maxim 10: Instill courage to embrace and manifest change**

At their core, all ten maxims require us, as consultants, to have, support and nurture courage. The extent and rapidity of change creates uncertainty and ambiguities that facilitate fear and anxiety. We can help by being personally courageous and by willingly exposing our own vulnerabilities and anxieties. Often, we can assist best by helping people to live with ambiguity and discomfort, and that means we have to live with it ourselves. As we have mentioned, we may fall back on theories because we feel more in control. It takes courage to float for a while with what is happening. As a colleague once said, "If you're not feeling imposter syndrome, you're not moving out of your comfort zone".

Nowhere is the question of courage more pertinent than with the recent take-over in Afghanistan by the Taliban, with repression and fear in stark relief, particularly for women and minorities. This is particularly heart-rending for us as we have worked extensively in Afghanistan in recent years with students on a 'Certified Organisation Leadership and Development Consultant Programme'. Only one out of twelve Afghan participants was a woman and, through coaching and support, we were able to connect her with other women championing women's empowerment. Although her situation involved many cultural barriers, she had the courage to break the concrete ceiling and achieve her goal of becoming a women's empowerment advocate, public speaker, and author writing about the challenges women face in Afghanistan. She has grown to become a courageous advocate of women's empowerment as seen through her social-media advocacy and presentations at international conferences. As recent events show all too clearly, this took enormous courage, and our role was to help her build a coalition of others with the same resolve. We hope she is able to live her dream.

### **Conclusion**

The ten universal OD Consulting maxims, and illustrative international examples from our practices, offer workable approaches for consultants and their clients for co-creating sustainable futures and fully developing and actualising their potential. Underpinned by OD behavioural science knowledge, the fundamental lessons of the ten maxims highlight the importance of collaborative engagement and the co-creation of interventions with people in the client system; attention to inquiry and effective engagement; amplifying human development and participation; and, finally, systems thinking.

### **BIOGRAPHIES**

Justine Chinoperekweyi worked with institutions including academic and vocational systems in Africa, Asia, and France. He designed and delivered tailored faculty development programs for Zimbabwean, Indian, and Filipino schools. As an academic and field mentor, he supports Masters, doctoral, and executive education programs in Africa, Asia, and France. He works with educational and private sector institutions in improvement planning, corporate governance policy review & development, SMEs development, curriculum review, faculty engagement, career services, quality assurance, and student success. He designs workshops, mentorship programs, and provides learning assessment support. Justine worked on OD & Case Management program design, and executive professional education program attended by members of two government departments in Afghanistan. He co-designed the Women Reorientation and Capacity Development initiative targeted at Afghanistan women; and was advisor on one Afghanistan SMEs incubation scheme. He is the CEO of Centre for Organization Leadership and Development, Zimbabwe. He is the author of a number of books including *Organization Development Review: Resource for Practice Academics and Instructional Practitioners*.

Cheryl Young spent over 35 years supporting top management of organisations to introduce and implement change, and build capability in line with their purpose. This included work in organisational development and design, culture change, large-scale whole system interventions, and leadership team development. Her approach was to work in partnership with leaders helping them see their organisations more clearly, explore possibilities, and implement practical approaches to complex situations. She worked with different national cultures, often through international joint ventures and alliances in multi-national organisations in sectors such as energy, satellite technology, international banking, food and drink, universities, public sector and NGO's. She has a BA in Psychology from Simon Fraser University in her native British Columbia and an MSc from University of London. Having retired from direct client work, she now mentors and supervises external and internal OD&D consultants in the practical application of OD&D in complex systems.

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## NOTES

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