

# 19

## IDENTITY WORKSPACES FOR LEADERSHIP DEVELOPMENT

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*INSEAD*

Profound changes in individuals' relationship with their employers and expectations for their work lives have generated an increasing demand for leadership development, while at the same time exposing the limitations of traditional leadership programs focused on the acquisition of conceptual knowledge and requisite skills. This chapter explores how conceptualizing leadership programs as "identity workspaces" helps to meet the demand for leadership in ways that benefit individuals, organizations, and society. Alongside the acquisition of knowledge and skills, identity workspaces facilitate the revision and consolidation of individual and collective identities. They personalize and contextualize participants' learning, inviting them to wrestle with the questions "What does leading mean to us?" and "Who am I as a leader?" Attention to both activity and identity deepens and accelerates the development of individual leaders and strengthens leadership communities within and across organizations.

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I describe the conceptual foundations, learning processes, design principles, and professional competences that enable leadership programs to function as identity workspaces. Designing such programs, however, takes more than adopting the methods described here. It calls for revisiting the role of leadership developers as professionals and demands of us the same mindfulness, curiosity, courage, integrity, and social responsibility that we invite leaders to demonstrate.



**W**e live and work in times of unprecedented change, or so we are told. Globalization has increased the uncertainty, complexity, diversity, and amount of information we face daily (Kanter, 2010). Hardly a month goes by without a new crisis in the economic, political, or environmental domain. In organizations, multilayered hierarchies have given way to flatter team-based structures in the pursuit of efficiency and flexibility. Gone is the traditional bond between corporation and employees, wherein the latter offered long-term commitment in exchange for security and career ladders (Rousseau, 1990). No longer expecting, or expected, to offer life-long loyalty, the commitment of talented employees often lasts only as long as an organization provides valued opportunities to exercise and develop their skills (Capelli, 2008). Itinerant careers that unfold across organizations, sectors, and countries are held in high regard (Arthur, 2008; Sennett, 2006). Such careers are viewed as a prerequisite for developing the perspective and skills necessary to operate effectively in a globalized world, as well as a status symbol—the mark of being among those valuable few for whose services companies engage in global “wars for talent.” As the head of research at a major investment bank once told me, gesturing toward the expanse of desks that hosted some of the world’s most respected analysts, “I can’t preach loyalty to these people. I would be laughed at. All I can say is—if you work here you have more learning opportunities than elsewhere.”

I am sure you have heard this story. The world is flatter, faster, and less predictable than ever before—and so are organizations.

A diverse pool of talented individuals hops freely across them in pursuit of experience, opportunity, and meaning. We might ask whether this picture reflects the lives of most people or whether it is more a product of media hype and management gurus preoccupied with the whereabouts of a small elite. The answer matters little. The popularity of the story is undeniable, as is the uncertainty it generates. Either as a new social context, a dominant narrative, or both, this background affects the meaning and exercise of leadership and requires revisiting the way leadership is developed.

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### *The Essence of Leadership: Activity and Identity*

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Calls for more and better leadership are ubiquitous—in business, in politics, in the professions—and appear as contemporary as the turbulent, globalized, and hyperconnected contexts in which leaders are meant to operate. The allure of leadership and the concern with developing it, however, are not new. Since the dawn of time, the survival and success of any community has hinged on its ability to develop leaders who are able to hold it together, help it address current challenges, and articulate its possible future. Who is entrusted with leading a tribe, a military operation, an academic department, a multinational company, or an insurrection—and how they are expected to lead—may be very different. The essence of leadership, however, never changes.

Regardless of time and place, leadership serves two purposes—one symbolic

and the other functional—that respond to fundamental human needs. The first is the need for living examples of what we believe is right, good, and worth pursuing. The second is the need to stick together and get things done. The *identities* of leaders we admire and follow reflect the values, customs, and desires of a community at a point in time. But whether an individual or a group, one thing remains the same: Leaders are symbols of possibility. They define the chasm between who we are and who we hope to be. The *activities* we regard as effective ways of leading also change depending on how we expect to be treated. But whether autocratic or empowering, resolute or open-minded, ruthless or gentle, leaders are always a means to an end. They mobilize performance to accomplish a task.

Much has been said about how leaders must act to mobilize performance in this day and age. First, leaders cannot rely solely on the authority formally vested in their position. They need to influence and inspire, understand the web of networks within and across organizations, and cultivate them. Second, leaders need to recognize and value the unique styles of their people in order to retain, motivate, and develop them. This requires awareness and empathy as well as facility with giving and receiving candid feedback. Third, leaders need to be comfortable with initiating or dealing with change. This involves the capacities to provide direction, mobilize others, and control progress—as well as the sensitivity to offer reassurance, hope, and containment for the inevitable tensions that change entails. Fourth, leaders need to check their ego at the door. The scope and complexity of today's challenges demand that leadership be shared with one's team, if not even more broadly. Leadership is not the preserve of senior executives. It is exercised at all levels, regardless of someone's job title. Organizations do not need lonely heroes at the top. They need all the leadership they can get.

Whether these leadership activities (or disillusionment with leadership mores of past generations) are truly new or not, it would be imprudent to discount the importance of acquiring such a leadership tool kit alongside one's technical competence and strategic insight. Honing skills of informal influence, networking, emotional intelligence, change management, teamwork, and so forth, however, is not enough. Consider the development of a musician. Just because you have a musical ear and practice relentlessly to refine your skills, it does not mean that you will become a successful concert pianist. We speak of a masterful interpretation when a musician gives personal expression to the score and makes us feel like we are hearing it for the first time. Albeit grounded in years of practice and infused with the musician's personal identity, an interpretation is only masterful when it resonates with listeners. The audience may be silent, but it is not passive. The sensitivity of their ears is as important in making an interpretation moving as is the pianist's touch. Magic occurs when the pianist's enactment of "who I am as a musician" vibrates in accord with the audience's sense of "what this music means to us." One moves the other, and vice versa.

Leadership is much like that. Talent and skills are necessary but not sufficient. Followers ultimately bestow leadership. Leaders are most inspiring and effective when their message is deeply personal and yet touches shared concerns—when what they do is intertwined with who they are and resonates with what followers are ready to hear and able to appreciate. (This is also when leaders can be most dangerous and are most vulnerable.) Leaders' actions are most effective and meaningful when their enactment of "who I am as a leader" ("who we are . . ." if a group) is in accord with followers' sense of "what leading means to us."

Here lies a pressing challenge for the exercise and development of leadership. In a world of thick boundaries, homogeneous

groups, and long-term employment, leaders had much in common with those they led: the same culture, broadly similar upbringings, comparable lifestyles, perhaps a long shared history in the organization. None of this can be taken for granted today. In a world of porous boundaries, increased mobility and diversity, and reduced organizational identification, questions such as “Who am I as a leader?” and “What does leading mean to us?” are harder to answer. Leaders, like musicians, are expected to move audiences whose members have varied views of what music means and who hold no season ticket. More than ever, leaders need to grasp the interplay between activity and identity. Unfortunately, much of what goes under the banner of “leadership development” remains limited to the former, focusing on abstract knowledge and behavioral competencies and offering little insight into the ways leaders are made, or broken, in the space between their personal history and aspirations, and the dynamics of groups and social systems in which they live. This raises two questions: *How* can this latter insight can be fostered? And *where*?

### *Identity Workspaces and the Demand for Leadership*

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In the past, employers were central to individuals’ professional and personal identity and hosted its unfolding over time. This is less likely today. Given the fluidity of work environments and the loosening of the relationship between individuals and organizations, many people no longer deem it wise or desirable to entrust their development to their employers. As a result, as Jennifer Petriglieri and I have argued, employing organizations are less likely to be experienced as “identity workspaces” (Petriglieri & Petriglieri, 2010).

An identity workspace is a holding environment for identity work—an institution entrusted to facilitate the process of

consolidating existing identities or crafting new ones. Institutions are entrusted as identity workspaces when they offer a combination of three features: conceptual frameworks and routines that help members make sense of themselves and their environment, as well as feel comfortable and act competently in it; communities they identify with and that provide a mixture of belonging, support, and challenge; and rites of passage that facilitate and integrate identity development and role transitions. It is our hypothesis that the growing psychological distance between organizations and their employees has led the function of providing identity workspaces to be invested in business schools in general, and leadership courses in particular (Petriglieri & Petriglieri, 2010).

Requests for support in crafting identities seldom lie far below the surface of organizations’ or individuals’ interest in leadership programs. In sponsoring such programs, corporate representatives usually seek assurance that the course will develop a community of leaders whose aspirations, worldview, and behavior are closely aligned with the company’s strategic intent, desired culture, and competency models—which are, from an identity perspective, local attempts to answer the question “What does leading mean?” On entering a program, however, most participants are less concerned with the way it is tailored to be consistent with organizational models than with how it fits with their concerns and aspirations. They want to know to what extent it will help answer the question “Who am I as a leader?” as well as enhance their effectiveness and future potential within and beyond the organization. In this dual intent lies a struggle for control: of employees’ hearts and minds, on the one hand, and of career trajectories and work environments, on the other. While the agendas of organizations and individuals can be aligned, this does not always happen. Furthermore, another agenda needs consideration: Since leaders and their organizations influence

and are influenced by society at large, a social agenda is at play, whether we are mindful of it or not.

Leadership programs realize their full potential as identity workspaces when they add value to all three constituencies, that is, when they deepen and accelerate individuals' development as leaders, strengthen a leadership community mindful of (not subservient to) their organization's culture and aims, and define leadership to encompass responsible citizenship in society at large. Leadership programs underdeliver as identity workspaces when they serve one agenda only, for example, when they are thinly veiled attempts at indoctrination and demand that individuals fit academic, organizational, or cultural templates without offering opportunities to inquire what these molds mean to individuals. Or when they are too focused on individual participants, helping them understand the origins of personal idiosyncrasies and the impact of habitual behaviors with little opportunity to examine how one's experience is constantly shaped by the social context. Such one-dimensional programs fuel illusions of control: for example, the illusion that a program can yield a motivated and aligned workforce, a pool of leaders in name only who follow corporate directions as if they were their own; or the illusion that the right mix of soul-searching, feedback, and skill may allow one to stay true to oneself, influence others, and shape organizations without having to wrestle with the power struggles, emotional tensions, and moral questions that are part and parcel of leading.

This is the main obstacle to maximizing the potential of a leadership program to serve as an identity workspace: a widespread desire—on the part of organizations, participants, and faculty—to control the learning process and over-determine up front what will be learned. Everyone wants leaders who are better equipped to deal with uncertainty and surprise. We just do not want either in leadership programs. (Perhaps there is too much of both

everywhere else.) As a result, many such programs are designed, more or less consciously, to foster compliance rather than open possibilities—the very opposite of what we say leaders must do. This does not mean that sponsoring organizations and faculty should not identify desired outcomes for their leadership programs. Rather, it means that the pursuit of prescribed outcomes must be balanced with the provision of spaces in which participants can pursue, discover, and question their learning agendas, both individually and collectively.

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### *Working With Experience, Identity, Emotion, and “the Unconscious”*

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The conceptualization of leadership development programs as identity workspaces—and my approach to designing, staffing, and working within programs that can function as such—rests on three streams of research. The first highlights the primacy of experience in leaders' development, the second links identity to leaders' development, and the third concerns the role of emotions and unconscious factors in the exercise and development of leadership.

**Experience.** Researchers agree that the primary means through which leaders develop are experiences of leading and following (DeRue & Wellman, 2009; Kolb, 1984; McCall, 1998). Experiences, however, do not automatically turn into learning. Learning from experience is an active process, and scholars have suggested that a major question in leadership studies is not “what should be taught in leadership courses, but *how can leaders be helped to learn?*” (Hackman & Wageman, 2007, p. 46, italics in original). This involves helping leaders maintain an attitude of personal responsibility toward their development (McCall, 2010) and enhancing their motivation and ability to learn from ongoing experiences (DeRue & Ashford, 2010a).

It also involves exposing the psychological and social underpinnings of the ways we learn and addressing potential limitations in both areas.

At the psychological level, becoming better learners requires examining how the “images, assumptions, and stories that we carry in our minds of ourselves and others” (Raelin, 2007, p. 509) influence the ways we approach, understand, and draw conclusions from experiences (Snook, 2007). At the social level, it requires grasping how the communities we come from and those in which we live—our families, schools, organizations, and cultures—enable, channel, and constrict our capacity to learn (Reynolds & Vince, 2004). Learning about how our inner and social worlds affect the ways we make sense of and act on our daily experiences inevitably requires engaging with experience and reflecting upon those engagements—personally and with others (Raelin, 2007). It cannot be done by just thinking about past experience or discussing others’ experience (Hackman & Wageman, 2007). Such learning is best accomplished when we are removed enough from the rush and familiarity of our daily routines and contexts. The distance allows us to reflect on experience more than we usually do and to experiment with conclusions we draw and actions we take (Day, 2010; Ibarra, 2003; Petriglieri, Wood, & Petriglieri, 2011).

**Identity.** A growing body of research has examined the role of identity in the emergence and effectiveness of leaders. This work suggests that the acceptance by others and the effectiveness of leaders hinge on their internalization and enactment of identities that are congruent with their life story (Shamir & Eilam, 2005) and symbolize what is good and unique about their social groups and organizations (Haslam, Reicher, & Platow, 2011; Van Knippenberg & Hogg, 2003). Building on these insights, a literature on the importance of identity development in the process of leaders’ development is emerging (Day,

2001; Day & Harrison, 2007; DeRue & Ashford, 2010b; Ibarra, Snook, & Guillen Ramo, 2010; Lord & Hall, 2005).

Complementing traditional concerns with the acquisition of knowledge, skills, and abilities, this research suggests that developing leaders entails deep personal work (Lord & Hall, 2005; Mumford & Manley, 2003; Petriglieri & Stein, 2010; Shamir & Eilam, 2005). Such personal work involves examining and revising the ways leaders make meaning of, respond emotionally to, and act on situations, encounters, experiences, goals, and aspirations (Petriglieri et al., 2011). Central to the process is reflecting on how one’s life story orients one’s understanding of and actions in the world (Kegan, 1982). Leaders who through this process integrate their life story and leader identity are said to be “authentic,” that is, they “have made [their] values and conviction highly personal through their lived experiences, experienced emotions, and an active process of reflection on these experiences and emotions” (Shamir & Eilam, 2005, p. 397). Assisting this kind of personal work requires professionals with the appropriate training and expertise (Berglas, 2002; Hart, Blattner, & Leipsic, 2001; Kilburg, 2004; Sherman & Freas, 2004; Wood & Petriglieri, 2005a).

**Emotions and “the Unconscious.”** While corporate and academic competency models put much emphasis on observable characteristics and behaviors, managers are keenly aware of “the emotional and moral labor of creating choices and meanings for themselves and others” (Bolden & Gosling, 2006, p. 159). Leading well often requires moving toward anxiety-provoking situations in order to learn more rather than attempting to reduce anxiety quickly. It also requires the abilities to manage one’s (and others’) emotional arousal, resist acting on impulse, and sometimes temporarily to raise anxiety in the service of fostering learning and change (Hackman & Wageman, 2007). This emotional labor is



most pronounced when organizations face “adaptive challenges”—major crises, shifts in their environment, and/or radical organizational changes. Such challenges call for leaders to ignite and contain strong feelings—ranging from hope and excitement to fear and loss—as organizational members revise deeply held values, beliefs, and habits (Heifetz, 1994).

Emotions, in leadership as elsewhere, are not always conscious. A recent review of research in this area concluded that “the notion that much of what we do is influenced by processes outside our conscious awareness is no longer a theoretical claim or the province of clinical observation” (Barsade, Ramarajan, & Westin, 2009, p. 145). Learning to lead, therefore, involves “learning about the way emotions irrationalize supposedly rational processes and make them what they are” (Fineman, 1997, p. 21). Clinical approaches that invite the exploration and integration of the emotional forces that impinge on the exercise of leadership are best suited to foster such learning (Kets de Vries, 2005; Petriglieri & Wood, 2005a). Central to these approaches is the idea of “the unconscious,” a term best intended as shorthand for the assortment of covert psychological and social forces that elude human rationality.

Whereas some clinical perspectives portray the unconscious as a repository of demons left behind by early trauma—much as Freud did a century ago—the approach that informs my work builds on a characterization of it as a surprising but well meaning and often enriching element of human nature (Petriglieri & Wood, 2005a). This approach views the psyche as not only bound by the past in endless repetition of infantile experiences and early identifications but also as pulling the individual toward the achievement of a fulfilled life and purposeful work (Petriglieri et al., 2011). In addition, it pays much attention to systems psychodynamics (Gould, Stapley, & Stein, 2001; Jaques, 1955; Menzies, 1960; Miller & Rice, 1967), that is, to the ways in which the

emotional needs of individuals and groups shape structures, processes, and cultures in a social system and to how these structures, processes, and cultures, in turn, shape the experiences of those individuals and groups.

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### *Learning Process: Contextualization and Personalization*

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Drawing on the research outlined above, I consider leadership programs well suited to serve as identity workspaces when they include a significant experiential component, involve learning about the activities and identities associated to leading, reveal the interplay between individual functioning and group dynamics, integrate the acquisition of knowledge and skills with opportunities for personal reflection and experimentation, and expose the emotional and often unconscious dynamics at play within individuals, groups, and organizations. These programs must be connected to, yet removed from, participants’ organizational context, everyday experience, and familiar mores. Each needs to be present but not dominate the program so that it can be examined and experimented with. Getting the balance right makes it possible to contextualize and personalize the learning process.

**Contextualizing the learning** means embedding it in the language and culture of participants’ organizations and social contexts. The purpose of doing so is not uncritical indoctrination. It is to use those languages and cultures as templates that orient individual and community development, to reflect upon and examine them, and to take ownership of their existence, maintenance, and change if necessary—rather than viewing them as external to one’s practice. When all participants work in the same organization, that organization’s culture is often enacted and easiest to examine in program interactions. When

participants come from different organizations, the cultural enactments often reveal, and make it possible to examine, widespread assumptions and practices that pervade many organizations' cultures.

**Personalizing the learning** means linking it to participants' historical and current experiences (Petriglieri et al., 2011). The purpose is to help individuals examine and integrate the ways their history and aspirations interact with social pressures to affect the way they think, feel, and act. The main vehicle for this process is the program's experiential component, which magnifies participants' habitual patterns of cognition, emotional response, and behavior, and makes them available for exploration. This, in turn, sustains experimentation with both interpretations of further events and behavior within those events.

Providers of leadership programs often put much emphasis on learning contextualization, usually referred to as "program customization." Learning personalization is equally important. Contextualization assures that a program is relevant, personalization that it is meaningful. Their combination deepens leaders' development by linking what they do to their history and context; accelerates it by helping them learn more from their experience; and strengthens leadership communities by increasing their openness and shared ownership of the organization's culture. The integration between contextualization and personalization has long been a feature of rites of passage, which are a central component of identity workspaces.

### ***Design Principles: The Leadership Journey***

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Traditional rites of passage—such as initiation rituals—facilitate the transition from one social status and life stage to another. They transmit current knowledge, values, and cultural norms; impart moral principles;

and instill a sense of belonging to a community while providing a container for personal transitions (Campbell, 1972; Trice & Beyer, 1984). Through them initiates do not just learn the narratives of the group they are entering; they become part of those narratives. While the content of rites of passage is tied to local cultures, their unfolding is universal (Eliade, 1995; Van Gennep, 1960). They involve a separation from one's familiar context; a period of "liminality" that includes reflection, instruction, and experimentation; and, finally, reintegration into society with a new identity and the perspective and behavior associated with it. This cycle is portrayed in countless narratives of mythical journeys (Campbell, 1994), which offer both an apt metaphor and useful principles for the design of leadership programs as identity workspaces.

**The metaphor of a journey** is fitting for leadership programs that aim to involve development of practical skills, acquisition of relevant knowledge, inspiration to pursue long-term development, and strengthening of a community and shared culture. A journey is an experience that can transform our view of the world and of ourselves. The metaphor suggests that these programs engage participants cognitively, emotionally, and practically, and that the learning may result from the pursuit of desired aims as well as from the surprises encountered along the way. Such journeys are deeply personal, and yet they cannot be taken alone.

**A focus on groups** is the first design principle. Participants are divided in study groups of 6–7 members. Leadership cannot be exercised or developed in isolation, and these learning units provide both the material and context to investigate the ways in which individuals influence groups, and vice versa. Groups discuss cases and readings and, most importantly, engage in a series of activities during which the focus of the group's "study" is its own experience. These sessions allow participants to explore and experiment with their interpretations



and behavior, give and receive candid feedback, and examine how their group develops or reflects a culture and how it interacts with other groups.

**A progression through four stages** is the second design principle. Building on the developmental process portrayed in mythical journeys, Jack Wood and I have suggested that meaningful experiential leadership development unfolds in four stages—preparation, orientation, experimentation, and integration (Wood & Petriglieri, 2005b).

*Preparation* occurs before the program convenes. Participants read cases and articles that will be discussed in the first part of the program and give some thought to their learning objectives in consultation with colleagues and significant others. The main activity of this stage is drafting a “Personal and Professional Identity Narrative” (PPIN), a confidential autobiographical document that will serve as a basis for individual coaching and inform their development plans. The PPIN kick starts the process of exploring participants’ history, communities, and aspirations, and invites them to bring their whole self to the program. Sometimes, a 360-degree feedback instrument brings the views of participants’ managers, colleagues, subordinates, and clients into the program as well.

*Orientation* occurs in the first portion of the program. The leadership concepts and ideas outlined earlier are introduced using traditional case discussions, mini-lectures, and role plays. These sessions touch upon the functional and symbolic aspects of leadership; the reciprocal influence between leaders and groups; and the centrality of unconscious dynamics and emotional factors to the experience of leading. Early on, the central idea is introduced that anyone can lead and learn. However, who leads and what they learn has much to do with their identity and those of their followers. Besides introducing these concepts, the sessions problematize leadership and leading as personal and social

phenomena rather than abstract entities. In suggesting that personal history and social processes affect the meanings we associate with “leadership” and the ways we exercise it, they provide the conceptual backbone for the experiential portion of the program and invite participants to engage fully in it.

*Experimentation* occupies the central part of the program, which features an experiential “leadership in action” workshop. At the outset, groups are introduced to their “leadership consultants” and invited to articulate their learning aims and concerns. This contracting session marks the transition into a part of the program in which learning derives from examining and experimenting with the experience of leading and following. Experience in and between groups, in the present, provides the primary data for individual and collective exploration. Accounts of past experiences (such as those in participants’ PPINs) or others’ observations (such as those in 360 feedback reports) are not shared in groups but, rather, provide secondary data to support participants’ further reflection on their experience. Participants are free to explore as much, and as fast, as they decide—and they are invited to take responsibility for their learning and that of classmates. Much as one cannot lead without taking responsibility, one must be free and responsible for learning to lead. After the contracting session, groups go through a series of activities over a day or two, each followed by a debriefing during which the group explores its experience with the assistance of their consultant.

Some activities are indoors, other outdoors. Some privilege creativity, others execution. Some involve other groups, others do not. The activities are not intended as simulations, team building exercises, or role plays. Their purpose is not to push participants into physical or emotional discomfort in order to generate feelings of confidence and connection on their accomplishment. Instead, they are meant to generate data for reflection, provide opportunities for giving

and receiving feedback, and offer a context for experimentation (Petriglieri & Wood, 2005b). The experiential workshop provides a space in which it is possible to be curious about, play with, and endeavor to make sense of both the overt, conscious, and rational aspects of individual and group behavior and the covert, unconscious, and emotional ones. Learning derived from this portion of the program is usually what participants remember most vividly.

I recently met a manager who had attended a program featuring this experiential workshop seven years earlier. He recognized me as his group's leadership consultant and came over to say hello. "I remember as if it was yesterday," he told me. "You stopped us in the middle of much activity, about 45 minutes into a one-hour project, and said, 'If you believe the structure you are so busy building will actually work, please raise your hand.' We looked sheepishly at each other. Everyone's hand was down. No one had any faith that we were going to succeed." The group was persevering on a course of action to which no one was committed. Individuals felt it inappropriate, as well as rude to the member who had first proposed it, to express their doubts. Keeping busy had helped them avoid giving much thought to, and expressing, their misgivings and concerns. "Every time I have been in a group since, and everyone is quietly busy," he continued, "I always ask myself, 'Is the purpose of all this activity succeeding? Or is it to stop ourselves from thinking and saying what we think?' I learned in that moment that you can't expect dissent unless you actively encourage it." This story suggests that insights gained from experience are most memorable and also exemplifies the nature of that learning. It is about doing something differently, such as encouraging constructive dissent, and about being attentive to one's own and others' experience without taking it at face value.

All activities are filmed, and participants have an opportunity to review and discuss

the videotapes of their group in action. The video review is followed by a plenary session during which each group prepares a short presentation on their learning and dilemmas up to that point and engage in a dialogue with other groups. This gives participants, who have so far explored experiences primarily within their groups, a chance to share and further each other's learning across groups. A debriefing follows the session to explore the intergroup dynamics that may emerge in the dialogue. An interpersonal feedback exercise—in which group members have a chance to give each other systematic feedback—ends this part of the program. If a 360 instrument is used, the report is distributed at this point so that participants can compare the feedback received in the program with that collected back home.

*Integration* is the focus of the last portion of the program. This phase aims to help participants deepen the connection between the program learning and their everyday context, and to encourage their ongoing development back home. It begins with a structured exercise that helps participants identify the deeply held assumptions that may limit progress in achieving personal changes they intend to accomplish (Kegan & Lahey, 2009). An individual coaching session with the leadership consultant further helps participants connect the dots between the learning in the program and their experience and development back home. It also invites them to explore potential links between their life story and their experience in current roles. Sessions on leading across differences in culture, personality, and career orientations conclude this portion of the program, which ends with a mini-lecture on reentry and a transition ceremony. Follow-up telephone coaching and peer coaching reinforce integration by inviting participants to articulate learning that has emerged after the program, and by supporting their efforts to apply and continue their learning.

**Confidentiality** is the third design principle. The purpose of these programs is development, not assessment. To maximize the possibility of experimentation and learning, all events occurring within the program are held in full confidentiality. No information pertaining to individual participants, or to their organization, is retained on file or divulged by the program faculty and staff under any circumstance. For the same reason, observers are not allowed in these programs, as their presence inevitably affects the dynamics in the room, regardless of the observers' integrity and intentions. I usually invite those that express a desire to observe to join the program as a participant.

### *Layers of Learning*

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The learning in such programs does not derive from dissecting the deeds of "great leaders"—prime ministers, CEOs, mavericks who succeeded against all odds—to gain inspiration and abstract lessons that can be practiced in one's daily work. It entails more than clarifying one's preferences through psychometric instruments, or receiving feedback on how one's behavior lives up to others' expectations and devising plans to close current gaps. Rather than putting the spotlight on how participants should and shouldn't lead, these programs put it on how they do lead every day—and why. The program functions like a microscope on the experience of individuals in social systems. Issues that participants face every day inevitably come to the fore, especially in the experiential portion. The difference between the program and everyday life is that within the program these issues can be discussed and reflected on more deeply because the community's primary task is to learn from its experience rather than getting on with any other job. Let me offer one example.

During the experiential workshop in a recent program, one group of international executives was faced with the challenge of crossing a (fictitious) piranha-infested river with the help of some planks, crates, and poles. Rather than trying to assemble a bridge using their allotted equipment, the group started splintering. The appointed leader kept being sent back to review the instructions in search of "the phrase that hints to the solution." Two members disappeared briefly into the woods nearby, returning with large stones which they started throwing "to kill the piranhas." Another was busy attempting to open a box—which had been inadvertently left in the "river" but was not part of the equipment—using a long pole. Two more members observed in silence. As the end of the exercise approached, frustration kept mounting. I commented that the group had devised the most creative ways to avoid working with the equipment they had been offered, and with each other. "It is not fair," the member holding the pole responded. "We are trying to think out of the box." I noted that, on the contrary, she seemed rather too preoccupied with what may be inside the box. My attempt at humor did not ease the tension, and the time fizzled out without much progress.

While one may describe such a group as having lost its mind, it is more accurate to say that its mind was exposed. As we debriefed this memorable debacle, the discussion slowly shifted from what could have been done differently (listen better, build a prototype, brainstorm, and so on) and all the ways in which a bridge could be built with the material provided, to a more generative question: Why did a group of intelligent and skillful people behave in such a seemingly irrational manner? They worked in a company that glorified employees who devised creative solutions to poorly defined problems. The company attracted individuals who prided themselves, above all, on their technical ability and commitment to innovation—and they

were the cream of that crop. Their interpretation of the exercise and behavior within it was coherent with what, more or less consciously, leading meant to them—being able to devise a clever solution to an intractable problem and getting others to “buy into” it. In the absence of an idea that all could line up behind, they were looking for inspiration everywhere but in the equipment they had, and in each other. “Doing something simple and easy just would not feel right,” one member candidly remarked.

The learning from that experience continued to ripen as the program progressed. Reviewing the videotape of the activity changed one group member’s interpretation of what had happened: “I thought that there had been no leadership in the group and we were not truly committed to succeeding, but the video showed something different.” Individuals had been committed to finding a way for the group to get across. There were plenty of moments in which various members offered the spark of a viable solution. Their leadership, however, was not taken up and the fire of collaboration never got going. As the group began reflecting on why they had kept working in parallel, it emerged that some competition for being the most creative (hence for being “the” leader) may have been at play. But it was not the whole story.

They admired each other’s skills and wanted to live up to the high standards they held themselves up to. Group members intended to, and did, help each other, but help always came in the form of advice. Asking questions without offering an alternative felt disrespectful. Clever ideas were the valued currency in relationships. Everything else classed as showing incompetence and wasting time. Everyone was eager to offer help, but few seemed comfortable asking for it. Their difficulty in working collaboratively was not due to lack of ability. It did not fit what leadership meant to them—a view moulded by the contexts they had spent most of their lives in. As this group shared these reflections with other groups in the program, it

became clear that the issue had manifested itself elsewhere, in many forms.

Another group described how they had realized that they were prisoners of a related individualistic assumption, that putting the “right people” in the right positions was all that it took to succeed. The realization had matured while examining their difficulty to get across a low-intensity rope course—easy to complete for groups that work together but practically impossible for an individual. They had chosen the member who seemed fittest and sent him across, while others overwhelmed him with encouragement, cheers, and advice. When he fell a few meters from the start, the group “generously” gave him several opportunities to “try again,” with even more raucous encouragement and copious advice. After a few attempts, doubts had begun to linger, and someone suggested trying another member, who met a similar fate. This is not uncommon. I have seen groups replace every single member, unconsciously giving everyone the same humiliating experience of failure, and then concluding that the exercise is “impossible.” In fact, it isn’t. It can easily be completed when team members—literally—give each other a hand. That is very hard to imagine and do, if leading to you means either showing the way from the front or directing from the sidelines.

These reflections showed in stark relief how participants unconsciously enacted, again and again, what leading meant to them personally and in their context. It also highlighted that their behavior was not fated. Revisiting those meanings would make different choices possible. The learning did not stop there. “I am sorry for snapping at you. I realize you were trying to get us thinking,” said the participant who had spent part of that fateful hour trying to open the empty box, as we sat down for the coaching session that concludes the experiential workshop. I reassured her that no apology was needed, and we set out to discuss what had happened. She had been really irritated with me then. As she saw it,

I had given them unclear instructions, stood watching while they floundered, and (as if that wasn't enough) I had criticized her best efforts to come up with an idea. That evening, while reviewing the videos, a group-mate had surprised her by not sharing her frustration. "It's just like at work. We take on projects where the brief is unclear," he had told her. "We put a brave face on and we find someone to blame when we can't get our act together." This remark had jolted her, and she had begun mulling over why she reacted so strongly, and in a way that felt familiar.

As I learned in the hour that followed, her history had been punctuated by subtle but painful betrayals by authority figures. These experiences had moulded the fierce independence on which her success rested. It had also left her with a constant feeling of mistrust about the intentions of people in authority. She could take up a challenging task and over-deliver but seldom let her guard down. She gravitated toward being the devil's advocate in groups and had several difficult relationships with past bosses. These conflicts were, in some way, a safe way to relate. They prevented the possibility of disappointment. They were also exhausting and often unnecessary, left her feeling unsupported, and deprived her of connections she may have enjoyed and benefited from. That was, to use her word, unfair. I noted that in sharing her irritation and reflections, she was showing great trust and in fact breaking that familiar pattern. She admitted that it was not as difficult as she thought it may be, and we ended our discussion strategizing potential ways to break that pattern, and take the risk to trust.

Revisiting what leading means in the communities we live in, and exploring the connections between our life story and our experiences in work roles, are not philosophical endeavors. They are steps that enable us to think differently, act differently, and relate differently. Long lasting change hinges on understanding and challenging both our assumptions and habits,

and the social arrangements that reinforce them. Follow-up conversations after the program often reveal similar themes. "I left the program with as many open questions as new insights," participants often report. (I regard such mix as a sign of these programs' success.) Once back home, however, they find themselves looking at everyday situations—a management team meeting, a performance review, a conversation with their spouse—from a different angle, more able to draw links between their personal experience and the dynamics of those interactions, and more inclined to act upon those insights.

Another learning participants commonly report is the realization that they are deeply implicated in shaping the culture and atmosphere of their groups and organizations. Every choice they make can reinforce those cultures or challenge them. The learning reported most often, however, goes beyond increased individual mindfulness, ability, and sense of responsibility. It has to do with changes in relationships with fellow participants, and with people back home. "I had worked with Lily for years," one executive once told me after a program, "and we had never been so direct with each other. The program was a landmark moment in the development of our relationship." I hear such remarks frequently and often made with a tone of surprise, as they contradict a concern harbored by many at the beginning of such a program—that opening up may compromise their relationships with other participants.

The layers of learning that I have described above touch on and connect the organizational, group, and personal levels. They are not, of course, a function of the program activities. The same river crossing debacle may have yielded more superficial learning had it been framed as a "game" and followed only by a short discussion focused on how the group could "improve" and what its members "should do differently." Participants would have behaved differently in the



next exercise, and reverted to type a few days later. The deeper, potentially transformative layers of learning would have remained hidden in plain view. Making those layers available requires giving time to the reflection process; allowing space for reflecting in large and small groups, in dyads, and individually; and focusing the reflection not on what should have happened but on why events unfolded the way they did. It requires participants who have the willingness to put judgment aside, the curiosity to give their experience a fresh look, and the courage to challenge each other's views. Finally, it requires professionals with the sensitivity and competence to facilitate personalized and contextualized learning.

### *Masters of Delivery and Facilitators of Development*

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Discussions among practitioners and within academic communities give little consideration to the individual and collective professionalism of leadership developers. Prospective clients, journalists, and even colleagues are often more interested in what pedagogies and designs I use, on the assumption that those drive the effectiveness of my programs—which they do in part. Design matters a good deal. The most common request I get, and always politely refuse, is to deliver a shortened version of the experiential workshop with fewer of the reflective sessions. The conceptual framing and flow of activities just described are necessary for a program to unveil the layers of learning and function well as an identity workspace. But they are not sufficient. Some learning will always occur with a good design, much like something will sprout in spring from a fertile, well-located field, regardless of how well it is farmed. Farmers who know the field and tend it with care, however, make a significant difference.

When I visit organizations that are interested in this approach to leadership development, after describing its general principles I refrain from showing a sample program design as is the norm in these meetings. I flick a slide, instead, with a picture of the group of professionals I collaborate with in delivering such programs. The point I am making is simple: Making good use of the design described here requires professionals who have the competence, sensitivity, and integrity to facilitate participants' inquiry into their experience—and to help integrate the learning back in their everyday life. Facilitating personalized and contextualized learning requires the ability to work with, and make links between, dynamics at different levels of analysis: the individual, the group, the organization, and the broader culture. This is why I favor the term "leadership consultant" rather than "coach." It requires different skills than those involved in teaching, coaching, or psychotherapy (Wood & Petriglieri, 2005a).

When I flick that slide, I talk about my colleagues' professional backgrounds and attitude as well as our way of working together. The former encompass training in the fields of adult development, group dynamics, and organizational behavior; the willingness to enter each program as a new venture; the ability to follow participants' pace and learning agendas; and the curiosity to learn from experiences. The latter rests on a professional commitment to be as reflective and engaged in our development, individually and collectively, as we ask participants to be. During each program, the consulting staff engages in extensive clinical meetings in order to reflect on its own experience and to share leadership and responsibility for the atmosphere and learning of the whole community. Between programs, everyone pursues ongoing personal development, participates regularly in experiential learning events from different traditions, and is engaged in examining and refining our practices.



### ***Who Will Benefit From This Approach? (And How Can We Tell?)***

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I have been involved in the application of this approach in organization-specific programs, in open-enrollment executive programs and MBAs, for cohorts identified as “junior managers” or “senior executives” in the private and public sector, and as a stand-alone offer or in the context of a multi-module design. The aim of developing individual leaders and leadership communities remains constant across settings, as does the effort to foster personalized and contextualized learning and the centrality of learning from experience. Specific design elements change depending on the program context. Since the agendas, concerns, and cultures participants import into the program are central to the learning process, however, leadership programs of the kind described here have only one thing in common: Each is unique.

Depending on their intent for the program, there are several ways in which companies and individuals assess these programs’ value and effectiveness. These metrics include, for corporations, internal surveys that probe employees’ morale, well-being, organizational identification, actual turnover and intention to quit, external surveys assessing the company’s appeal as a workplace, or bosses’ and direct reports’ subjective assessment of participants’ ability as leaders, and of the changes in the organization’s culture. For the individual, such measures often include access to coveted jobs, increases in salary and opportunities, or subjective experiences of clarity, ability, and meaning. Both organizations and individuals often value repeated 360-degree evaluations data, respectively as a measure of increased fit with a desired behavioral profile, or increased leadership ability as perceived by one’s key counterparts. There is often much talk about leadership programs’ “return on investment.” However, it may be more relevant to assess these programs’

*return on experience*, that is, the extent to which they enhance the ability of individuals and organizations to attend to, make sense of, and learn from a broader range of events and encounters. While this may be harder to quantify and measure, it may be the domain where such a leadership program delivers most value. Assessing it will involve qualitative inquiries into how participants make meaning within and among themselves before, during, and after a program.

### ***Conclusion***

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The more fluid and turbulent the business world becomes, the more leadership development programs are asked to provide identity workspaces that harbor the development of individual leaders and leadership communities. Leadership courses concerned only with the acquisition of conceptual knowledge and the practice of behaviors prescribed by “leadership models” are of limited use in fulfilling this mandate. Doing so requires approaches that foster the personalization and contextualization of participants’ learning and pay equal attention to what leaders do, who they are, and where they lead. The approach I espouse in my work, and have described here, helps participants examine and revise the ways they think, feel, and act as leaders (and followers) and recognize how these are constantly shaped by their history and aspirations, as well as by the dynamics of groups, organizations, and societies to which they belong. It invites them to examine their experience, encourages them to take personal responsibility for their development and joint ownership for the state of the systems they operate in, and enables them to work with the covert emotional currents that influence visible behaviors. Ultimately, it invites leaders to see themselves as instruments, rather than masters, of their purpose and community—and to rely on both for direction and support.

Conceptualizing leadership development as a potential identity workspace takes more than advocating suitable pedagogical methods and program designs. It involves revisiting the role of institutions and individuals who cater to the demand for leadership. To fulfill this function, we cannot just see our role in terms of creating and disseminating knowledge that allows better understanding of leadership and more efficient and effective leading. We must embrace a broader mandate that involves hosting individuals' identity development and shaping the meaning and exercise of leadership in organizations and society. This entails developing new skills alongside those required to conduct rigorous research and dazzle muted classrooms with articulate displays of knowledge and expertise. In addition, if leadership programs are important identity workspaces for current and future leaders, those who host them carry significant authority and responsibility toward individual participants, their organizations, and society at large. This calls for being mindful of all three when selling, conducting, and assessing our work—and not assuming that their interests are aligned. It also requires the courage to choose for whom we aim to serve as identity workspaces—what kind of leaders and organizations we are willing to help develop. There is no such a thing as a value-free identity workspace. Trying to be one only exposes us to the risk of becoming an identity workspace for leaders without concern for values.

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