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# Journeys through the Organisational Labyrinth

A Psychodynamic Look at  
Leadership Identities and  
Transitions

# The Annals of Psychodynamic-Systemic Practitioner Research

Volume 1

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## Editors

**Elizabeth Florent-Treacy**, Senior Lecturer and INSEAD Dutch Alumni Fellow  
in Leadership, Diversity, and Governance

**Manfred Kets de Vries**, INSEAD Distinguished Clinical Professor of Leadership  
Development and Organisational Change and The Raoul de Vitry d'Avaucourt  
Chaired Professor of Leadership Development, Emeritus

**Roger Lehman**, INSEAD Senior Affiliate Professor of Entrepreneurship and  
Family Enterprise

**Erik van de Loo**, INSEAD Affiliate Professor of Organisational Behaviour

## Managing Editor

Alicia Cheak, INSEAD Research Associate

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# PREFACE

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Elizabeth Florent-Treacy

There are many versions of the apocryphal tale about the business school professor who invited a group of senior executives to attend the Academy of Management conference, an annual event that brings together thousands of academics in management science disciplines, where researchers from around the world vie for slots to present their latest findings, with well-known academic “rock stars” filling conference halls to capacity.

The story goes that the professor proudly shepherded the executives through seminars on all sorts of new and innovative topics. At the end of the four-day conference, he asked the group what they had learned. “Well, most of the time we had no idea what you academics were talking about,” they responded. “It didn’t sound like what *you* think is important has any link to *our* daily reality.”

Indeed, in the field of management science - what we do in business schools - *rigorous* scholarship may not be seen as *relevant* by members of organisations themselves. Publications like the Harvard Business Review and some books on management trends bridge the rigor-relevance divide well, but in general, management scholars have created “a closed industry engaged in producing knowledge intended mainly for other academics.”<sup>1</sup> Indeed, “academia can be a competitive and self-serving environment in which researchers appear to be using the people they study to advance their own careers.”<sup>2</sup>

For obvious reasons, this is not ideal, neither for academics nor business people. As one observer ironized: Why go to the trouble of conducting research and writing articles that are only read by three people: your editor, your mother, and one envious colleague?

Clearly, organisation studies could focus more closely on “the wider world’s work.”<sup>3</sup> As Argyris insisted in 1970, organisational development research

interventions should involve entering into an on-going system of relationships, to come between or among persons, groups or objects, for the purpose of helping them.<sup>4</sup> But all too often, academic studies are “lost before translation,”<sup>5</sup> that is, they are based on theoretical ideas that are irrelevant to practice and therefore doomed to stay in an ivory tower.

As a result, most of the new ideas in management that catch on in organisations come from the world of practice, not from empirical academic studies.<sup>6</sup> This poses an interesting dilemma. On the one hand, people in the world of work are coming up with applicable ideas that academics might not have access to; on the other, the valuable contributions of academics are not fully exploited in the business world.

What if we were to bring the two worlds together more often? What if academics were to partner with real world practitioners? What if business people learned the craft of inquiry and applied it to organisational challenges? The potential reward is evident: pragmatic contributions to the study of organisations and a new approach to exploring organisational dilemmas for the practitioners themselves.

### **Contributions of the EMCCC Annals of Psychodynamic-Systemic Practitioner Research**

The first contribution of this collection is to show that business people can indeed do this kind of research. Virtually all of the contributors here began their research journey with some misgivings: “I have never written a research paper before and I’m not sure I can do it.” The journey from *there* to *here* - the work you are about to read - is a story in itself.

In this series of collected works the authors answer the call to “embrace the idea that we are charged with the responsibility of generating *useful* knowledge” [italics in original text].<sup>7</sup> Even more exciting is that the studies have been conducted not by academics but by the protagonists themselves. All the contributors are graduates of INSEAD’s Executive Masters in Coaching and Consulting for Change (EMCCC), and the papers collected here are short summaries of their theses.



The pedagogical design of the thesis element of the program can be summarized as follows: “What skills, awareness, understanding and ways of working do change agents need, and how can these be learned in ways that are dynamic, enduring and internalized? How can we help learners bridge the worlds of experience and theory, integrate their personal reflection with critical analysis and action, and draw from the strengths of diverse methods of inquiry?”<sup>8</sup>

In creating this program, now in its fifteenth year with over 500 graduates to date, we deviated - quite radically - from the standard business school approach. We began with a vision and an objective: to provide business professionals with a new lens through which to see their world holistically—starting with themselves and moving outward to family and group dynamics, and life in communities and organisations. We provide a space in which they can safely explore and experiment with different identities, including that of practitioner researcher.

This program is offered by a top global business school – INSEAD -where the predominant paradigm is left-brain thinking. This is not unique to INSEAD. Since the middle of the twentieth century, the emerging discipline of management science has been grounded in an empirical approach to research and teaching in attempt to align it, in terms of empirical rigor, with other hard sciences. At INSEAD, as at other business schools, the case study method (with a preponderance of male protagonists) combined with data-heavy content is still the dominant pedagogical paradigm. Final exams are the assessment method of choice, and starting salary after graduation is an important measure of success.

As a result, one of the first things we have to do is convince our EMCCC participants that they too can contribute to the body of knowledge in this field; in fact, as practitioner researchers they are at the forefront of making organisations better in multiple ways.

Over the span of the 18-month program, faculty and participants co-create a supportive environment in which they test different ways of knowing and learning. They write continuously, beginning with reflection papers and moving on to case papers in which they reflect on the issues they face in their respective context. They write practicum papers using various methods to observe and act in their world: participant observation, organisational ethnography, and action research.

The EMCCC program takes a dialogic approach, seeing organisations as constructed of multiple realities and intersecting social systems. This view emphasizes sense-making over objective truth.<sup>9</sup> Data collection is “less about applying objective problem-solving methods, and more about raising collective awareness and generating new possibilities that lead to change.”<sup>10</sup>

The second contribution of these collected works is the unifying “red thread” that runs through them all: the psychodynamic-systemic approach to the study of organisations. “Psychodynamic” means that they explore the underlying motivational factors and past experiences that influence current behaviour patterns; “systemic” means they consider the influence and interconnection of context, for example, family, the organisation in which a person works, and national culture. In brief, this paradigm, which is described in greater detail in the next chapter, not only identifies challenges and issues at the business level, but draws attention to the deeper sources of energy and motivational forces that give impetus to, or create inertia against, human actions in organisations.

By considering the way subconscious forces and need systems interact, it is possible to gain an understanding of individual, group, and organisational schemas—the “templates” that affect behaviour. A greater awareness of problematic relationship patterns can provide an opening to explore and work through difficult issues in the here-and-now, and uncover options for new behaviours or actions. In short, applying psychodynamic-systemic concepts to the ebb and flow of organisational existence contributes to our understanding of the vicissitudes of life and leadership.

An EMCCC executive master’s thesis is a tangible result of the dialogic organisation development orientation described above. We frame the theses as exploratory studies, but what emerges is much more than a detached, intellectual description of what is happening in the wider world of work. EMCCC practitioner researchers bring a much richer and deeper insight into the “why” behind thorny organisational dilemmas. They look into the penumbra of the logical, showing us what we did not see before. By exploring the “why”, ultimately we can advance towards the “how” i.e., pragmatic and sustainable options for change.

A third contribution of these chapters is the authors’ global perspectives and their position as participant-observers. Many of them consider well researched topics, but they add to our body of knowledge in that they look deeply into a specific

cultural or situational context, as in the chapters on the glass ceiling in South Africa, the experience of senior women bankers, and the way in which involuntary childlessness affects a person's career.

These are reports from people "at the coalface", from which the contributors bring us - armchair observers - stories in which universal truths are embedded. The contributors are not trying to prove anything, but through their insights they inspire in us renewed energy to change ourselves and the world of work.

<sup>1</sup> Corley, G. and Gioia, D. (2011). "Building Theory about Theory Building: What Constitutes a Theoretical Contribution?" *Academy of Management Review*, 36, 1.

<sup>2</sup> Taylor, P. and Pettit, J. (2007). "Learning and Teaching Participation through Action Research", *Action Research*, 5 (3), 236.

<sup>3</sup> Corley, K.G. and Gioia, D.A. (2011).

<sup>4</sup> Coghlan, D. and Shani, A.B. (2013). "Organisational-Development Research Interventions: Perspectives from Action Research and Collaborative Management Research". In S. Leonard, R. Lewis, A. Freedman and J. Passmore (Eds.). *The Wiley-Blackwell Handbook of the Psychology of Organisation Development and Leadership*. New York: Wiley, pp. 443-460.

<sup>5</sup> Corley, K.G. and Gioia, D.A. (2011).

<sup>6</sup> Corley, K.G. and Gioia, D.A. (2011).

<sup>7</sup> Corley, K.G. and Gioia, D.A. (2011:27).

<sup>8</sup> Taylor, P. and Pettit, J. (2007:234).

<sup>9</sup> Corley, K.G. and Gioia, D.A. (2011).

<sup>10</sup> Coghlan, D. and Shani, A.B. (2013:445).

# INTRODUCTION

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Elizabeth Florent-Treacy

Organisations are made up of human beings. In a world where the pace of technological revolution far surpasses that of human evolution, this bears repeating. Unlike machines, human beings - our physical bodies, our capacity to deal with emotions, our ancient patterns of forming and splitting off from groups - have changed very little in the past 10,000 years. Like it or not, everything that happens in an organisation is still influenced by the way people act – individually, in teams, in groups. Absolutely *everything*.

Human beings - as MBA graduates realise about ten years into their careers - cannot be crunched like numbers, nor can their behaviour be predicted. However, much of what motivates human beings can be understood; it is possible to catch a glimpse of logic in the most apparently illogical actions. This philosophy lays the foundation for EMCCC's approach to practitioner research. We take a psychodynamic-systemic approach that “engages a phenomenon from the perspective of those living it—a belief that rests solely outside the functional/positivist paradigm that still largely drives the organisational sciences.”<sup>1</sup>

The psychodynamic-systemic framework is based on four premises:<sup>2</sup>

The first is that *there is a logical explanation for the way people act—even for actions that seem irrational*. Because that explanation is often elusive - inextricably interwoven with unconscious needs and desires - one has to “peel the onion” to tease out hints and clues regarding perplexing behaviour.

The second premise is that a great deal of mental life - feelings, fears, motives - lies outside of conscious awareness but still affects conscious reality and even physical wellbeing. Though hidden from rational thought, the human unconscious affects (and in some cases even dictates) conscious reality. *Even the most “rational” people have blind spots, and even “good” people have a shadow side—* a side that they don't know, and don't want to know.

The third premise states that *nothing is more central to whom a person is than the way he or she regulates and expresses emotions*. Emotions colour experiences with positive and negative connotations, creating preferences for the choices we make and the way we deal with the world. They also form the basis for the internalization of mental representations of the self and others that guide relationships throughout our lives. The way a person perceives and expresses emotions may change as the years go by, influenced by their life experiences.<sup>3</sup>

The fourth premise underlying the psychodynamic-systemic paradigm is that human development is an inter- and intrapersonal process; *we are all products of our past experiences*, and those experiences, including the developmental experiences given by our caretakers, continue to influence us throughout life.<sup>4</sup>

To summarize, the psychodynamic approach focuses on the dynamics of human behaviour which are often the most difficult to understand. It acknowledges that people are complex, unique and paradoxical beings, with myriad motivational drivers and unique decision-making and interaction patterns.

## **Into the organisation labyrinth**

What are people in organisations seeking to address, encourage, celebrate or condemn? Examples can easily be skimmed from current headlines: board-level executives commit suicide; junior associates in investment partnerships work for days without sleep; more people admit to checking their work emails in the middle of the night. What, we might ask, happens to executives after retirement who still have good health and energy? Why are women still not making it to the top of the corporate ladder? And the list goes on. If we consider these to be symptoms of deeper ills, then we could argue that in many cases, the default “norm” in organisations is composed of systems that have evolved to become homogeneous, relentless, competitive, unforgiving, xenophobic, and self-replicating. The human beings in them - men, women, old, young, gay, straight - are often treated like commodities. And like any system, organisations favour homeostasis and resist change.

This does not mean that everyone in every organisation is bad, nor does it prevent many organisations from being different and far better. Most efforts to address the above issues are well intended, and many are effective. But the “norm” is still the most powerful underlying organisational paradigm. Paradigm shifts occur only when the norm can no longer be defended—when individuals

and groups enter the transitional space of what we refer to as the “organisational labyrinth”.

The organisational labyrinth is neither a straight nor clear path, but consists of a series of choices, transitions and transformations. Moving through the labyrinth is often confusing, painful and disruptive. Moreover, these transitions not only affect the actors themselves but also have implications for the organisation as a whole.

## **Identity, transitions and inclusion**

The chapters in this collection about life in organisations can be seen as stories of passage through the organisational labyrinth. In this first edition we have chosen to explore gender and diversity through a psychodynamic-systemic lens. These themes are actively explored during the EMCCC program (described above) and have emerged as reoccurring subjects amongst the theses submitted. Our authors, as participant researchers, take varied approaches to exploring them, suggesting that these issues are not confined to one gender, culture or stage of life, but encompass a broad spectrum of desires and needs.

Take, for example, the topic of gender diversity. The absence of women at senior levels in private and public organisations is a persistent concern. However, gender and diversity initiatives - which by their very nature prescribe a “norm” - can entrench rather than reduce gender equality through their focus on symptoms,<sup>5</sup> which itself implies a form of resistance to changing the underlying systemic paradigm. The reality is that both women *and* men are affected. The issue of attrition in the upper echelons and a growing discontent with organisational life are exacerbated not only by a deeply engrained gender role bias, but also a larger systemic issue of organisational incompatibility with the needs of the modern worker. Homeostasis, again.

Identity has been defined as self-schema—in other words, the idea one has of oneself. Identity is also social in nature and is created in relation to an individual’s identification with a social category or group.<sup>6</sup> As such, one’s self-concept is a complex fabric interwoven with multiple social identities;<sup>7</sup> we may be - all at the same time - a woman, wife, leader, mother, friend, European, Liberal, and so on.

Identity *interference* occurs when the demands and values associated with a person’s different roles are not aligned, or, worse, conflict with one another.<sup>8</sup> Incompatible roles can prevent an individual from achieving a level of satisfaction

and reward. One example of identity interference is the opposing behaviours typically expected from women and leaders. Gender stereotypes convey an expectation that women are more *communal* in nature, exhibiting qualities such as warmth, care, cooperativeness and selflessness.<sup>9</sup> Successful leaders, on the other hand, are expected to display *agentic* characteristics in the form of assertiveness, direction, competitiveness and problem solving.<sup>10</sup> Agentic characteristics are more strongly ascribed to men than women,<sup>11</sup> revealing an underlying bias in society and in organisations: “Think leader—think male.”<sup>12</sup>

This bias is so embedded in the mindsets of organisational actors - both men and women - that women are less likely to be considered qualified for leadership positions, and that once in leadership positions, they are perceived as less effective. Abiding by these stereotypes, women may undermine and doubt themselves and their leadership abilities if they do not conform to prescriptions. Due to this incongruity, they may feel pressure to adjust their behaviour to the implicit consensus on how women and leaders ought to behave.<sup>13</sup> In doing so, they find themselves in a double bind: by striving to be more leader-like, they stifle their feminine side, leading to further social disapproval and/or guilt.<sup>14</sup>

Another example of a leadership identity double bind occurs when an executive feels he or she can no longer hide or deny a homosexual or transgender orientation. If he or she decides, or is forced, to openly acknowledge this orientation, the subsequent individual identity transition disrupts the status quo in the organisation and requires a reorientation and re-adaptation for all concerned.

Identity transitions are part and parcel of life: birth, naming, puberty, marriage, children, and death. They are often an exercise in severance, whereby former attitudes, attachments and life patterns are left behind. Similar transitions occur constantly in the world of work, a consequence of an increasingly competitive, technological and globalized environment. The traditional roles assigned to men and women are rapidly changing; working adults are expected to be flexible and able to assume both breadwinner and caretaker roles. Change in professional identity is increasingly common at any age, with people transitioning from one job title to another, across different companies or industries, or becoming entrepreneurs or consultants.

Transition - whether at the individual or organisation level - is often described as a process involving three stages: separation, transition and incorporation.<sup>15</sup> Professional transitions can be seen a passage through which “people disengage from central, behaviourally anchored identities while exploring new possible



selves and, eventually, integrate a new, alternative identity”. This kind of transition involves the dynamics of a “liminal” in-between period in which people hover between old and new identities before integrating a deeper change based on their experience and practice during the transitional period.<sup>16</sup> These liminal spaces - when supported by a safe, experiment-friendly environment - are key opportunities for exploring and trying out possible selves. They are critical to cement the process towards a new, integrated and fully assumed identity. Thus, transition involves a deeply private and psychological process in which individuals internalize and come to terms with the demands and expectations of their new situation.

Transitions in the professional realm can be even more confusing or painful than personal ones. Most often, they are simply not encouraged or permitted by the organisation. Even when career development or professional identity experiments are tolerated, they are not always recognized, described or valued. A typical example is the mid-level high-potential executive sent on a business school leadership development program, only to find later that her newfound sense of purpose and ambition are not appreciated by her peers back in the office. Another is the executive who accepts an expatriate assignment described as a “great career move”—but when the time comes to return to HQ, no one really knows how to exploit his global experience.

However, if we can step back and reflect on what has gone before, as well as what we wish for in the future, we gain some degree of control over the often destabilizing and unnerving experience of a transition. This is what many of the authors in this book have done for themselves or with others. Their research and reflections lead to external change (changing roles/careers) and internal change in which they have developed a greater congruence between who they are and what they do.

### **The EMCCC Annals: A roadmap**

In publishing this collection of practitioner research we do not seek to add to the literature - or the headlines - on how to fix organisational challenges as described above. Instead, the authors situate and explore them as issues of identity transition, sometimes on the individual level, other times at the macro or organisational level.



While many of the papers here were written with a particular frame of reference - female leader, transition to functional roles, LGBT leader, family business succession, divorce, childlessness, and so on - we want the discourse to get beyond the individual “trees” and look at the proverbial “forest” —the bigger-picture implications for organisations as a whole. While individually they bring insights to a particular experience or phenomenon, collectively they reveal something larger at play. And it is on this playing field that we can address organisational challenges: looking beyond the individual to the group dynamics and specific organisational context.

For example, the phenomenon of the “impostor syndrome”, whereby leaders feel like a fake and are not able to fully assume their leadership identity, is addressed by Inge Maes in *Impostor Thoughts and Feelings During Professional Transitions*. What can organisations do to help people manage such self-defeating thoughts and behaviours? Or the example of a male leader who makes a decision to become a female leader described in *The Impact of a Transgender Transition on the Work Environment and How Fair Process Can Help Ease the Disorientation for Colleagues* by Angela Matthes. How can the individual facilitate the acceptance of this radical transition in his/her environment (peers and family members), and what does this tell us about how organisations can facilitate transitions in general?

For each issue addressed in this first collection there are implications and solutions that extend beyond the individual author and his or her story. Without this holistic, systemic perspective, we would be confined to piecemeal solutions that only address symptoms, not the underlying roots of the problem. And if we, as researchers, academics, practitioners and organisational actors, are sincere in our efforts for meaningful and sustainable change, we need to be open to the greater meaning and implications of the underlying collective stories that emerge.

Our hope is that as you encounter these rich and varied accounts of organisational life and challenges, you will discover insights and practical actions that may help you, your team, or organisation as a whole to navigate the journey through the organisational labyrinth.

<sup>1</sup> Corley, K. G. (2015). "A Commentary on 'What Grounded Theory Is...': Engaging a Phenomenon from the Perspective of Those Living It", *Organisational Research Methods*, 18 (4), 2.

<sup>2</sup> Kets de Vries, M.F.R. (2006). *The Leader on the Couch: A Clinical Approach to Changing People and Organisations*. San Francisco: Jossey Bass.

<sup>3</sup> Darwin, C. (1920). *The Expression of Emotion in Man and Animals*. New York: Appleton-Century-Crofts; Plutchik, R. (1980). "A General Psycho-evolutionary Theory of Emotion". In R. Plutchik and H. Kellerman (Eds.), *Emotion: Theory, Research, and Experience: Vol. 1. Theories of Emotion*. New York: Academic, pp. 3-33; Tomkins, S.S. (1995). "Script Theory: Differential Magnification of Affect." In V. Demos (Ed.) *Exploring Affect: Selections from the Writings of Silvan S. Tomkins*. New York: Cambridge University Press, pp. 312 – 410.

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<sup>5</sup> Padavic, I., Ely, R. and Reid, E. (2014). "The Work-Family Narrative as Social Defence." In *Gender and Work: Challenging Conventional Wisdom*. Research Symposium, Harvard Business School.

<sup>6</sup> Ashforth, B. E. and Mael, F. (1989). "Social Identity Theory and the Organisation", *Academy of Management Review*, 14 (1), 20-39; Tajfel, H. (1982). "Social Psychology of Intergroup Relations", *Annual Review of Psychology*, 33, 1-39.

<sup>7</sup> Deaux, K. (1993). "Reconstructing Social Identity", *Personality and Social Psychology Bulletin*, 19, 4-12; Thoits

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<sup>8</sup> Van Sell, M., Brief, A.P. and Schuler, R.S. (1981). "Role Conflict and Role Ambiguity: Integration of the Literature and Directions for Future Research", *Human Relations*, 34, 43-71.

<sup>9</sup> Eagly, A. H., Wood, W. and Diekmann, A. (2000). "Social Role Theory of Sex Differences and Similarities: A Current Appraisal." In T. Eckes and H. M. Trautner (Eds.), *The Developmental Social Psychology of Gender*. Mahwah, NJ: Erlbaum, pp. 123-174.

<sup>10</sup> Martell, R.F., Parker, C., Emrich, C.G. and Crawford, M.S. (1998). "Sex Stereotyping in the Executive Suite: Much Ado about Something", *Journal of Social Behaviour and Personality*, 13, 127-138.

<sup>11</sup> Eagly, A. H., Wood, W. and Diekmann, A. (2000).

<sup>12</sup> Schein, E. (2001). "A Global Look at Psychological Barriers to Women's Progress in Management", *Journal of Social Issues*, 57 (4), 675-688.

<sup>13</sup> Eagly, A. H., & Johannesen-Schmidt, M. C. (2001). "The Leadership Styles of Women and Men", *Journal of Social Issues*, 57, 781–797.

<sup>14</sup> Fiske, S.T., Cuddy, A.J.C., Glick, P. and Xu, J. (2002). "A Model of (Often Mixed) Stereotype Content: Competence and Warmth Respectively Follow from Perceived Status and Competition", *Journal of Personality and Social Psychology*, 82 (6), 878–902; Rudman, L. A. and Glick, P. (1999). "Feminized Management and Backlash Toward Agentic Women: The Hidden Costs to Women of a Kinder, Gentler Image of Middle-Managers", *Journal of Personality and Social Psychology*, 77, 1004-1010.

<sup>15</sup> Ibarra, H. and Barbulescu, R. (2010). "Identity as Narrative: Prevalence, Effectiveness, and Consequences of Narrative Identity Work in Macro Work Role Transitions", *Academy of Management Review*, 35, 135-154.

<sup>16</sup> Ibarra, H. and Barbulescu, R. (2010).



PART ONE:

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# THE HERO'S JOURNEY

Part One introduces us to the varied rhythms and phases of rites of passage, an eternal and fundamental process in which the hero or heroine is compelled to undertake a journey. In traditional myths about a transition, the protagonist – whatever the life challenge – follows a similar path. The journey begins with the abandonment of old relationships and routines, and the individual is propelled into an ambivalent and confusing in-between zone. If these passages are navigated successfully, the transition is concluded with a newly integrated sense of self, renewed energy, and newfound meaning and purpose. Applying this framework to the world of work, we discover that professional transitions can be explored and understood as rites of passage, with ramifications both externally (career or life decisions) and internally (professional identity construction).

In his chapter Laércio Cardoso describes *leaving corporate life* as a natural rite of passage. Attitudes, attachments and patterns evolve during the transition which prepare a person for a new career. Cardoso presents key stages that correspond to a journey through a labyrinth, with the outcome being self-actualization and the mastery of old and new worlds. He also notes that the contemporary notion of a career is now broader: individuals now seek work that provides meaning and purpose, not only financial reward and security.

Inge Maes' chapter on *imposter thoughts and feelings* during professional transitions explores what can be done to facilitate professional identity transition for individuals who "feel like a fake". Such thoughts undermine a leader's ability to confidently take full ownership of his or her role. Taking a very practical approach, she describes a successful workshop design that drew on action research and group therapy, in which people address and work through impostor thoughts and feelings.

# Transitions from Corporate to Independent Careers

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Laércio Cardoso

## The Starting Point

When looking for a theme for my thesis, I was advised to write about a subject of my own interest, a subject that was closely related to me. Joseph Campbell's "Hero with a Thousand Faces" (2008) had been a close companion during my own personal transition journey and guided me through the different phases of it. At age 50, I decided to simultaneously leave a marriage of 25 years and a high-profile global corporation where I had worked for 25 years. I found in Campbell's words the inspiration, comfort, challenge and will to continue the long journey I initiated just after my 50<sup>th</sup> birthday. I was curious to know if I was alone on this journey or, as Campbell perceived, sharing it with thousands who had crossed the portal, entered the labyrinth, and found their way out of it.

## Idea In Brief

A rite of passage is a transition from one life stage to another. It is an exercise in severance during which an individual leaves behind certain attitudes, attachments and life patterns, and moves into the next phase of life. In the last two decades there has been a significant increase in the number of working professionals who embark on the transitions from a *corporate career towards an independent one*, such as consulting, executive coaching or entrepreneurial endeavours. In this chapter, inspired by Campbell's framework, I analysed the journeys of seven individuals who exited large corporations to pursue new, independent careers.

The key findings are:

- Career transitions are a form of rite of passage. Chaos, confusion, uncertainty and doubt are a natural part of the process, as are acceptance, peace, a sense of fulfilment, confidence and hope.
- While emotional, unsettling and disruptive, transitions also provide opportunities for self-renewal and self-actualization.

- Framing career transition as a rite of passage, with key phases and sub-phases, can help a person gain better perspective and clarity as he or she moves through the arc of the transition process.

### **Idea In Practice**

For people who are in the throes of exiting corporate life - planned or unexpected - to become independent professionals, the classic model of the hero's journey can provide a useful starting point for exploration and dialogue about the future. An awareness of the elements that help or hinder each phase in such transitions enables them to see opportunities rather than to give in to discouragement or despair.

## Introduction

Mythology is a set of stories and ideas that try to make sense of the world and of our place in it.<sup>1</sup> They are present in the human collective unconscious and reflect basic patterns that are common and universal. Myths foster personal development because they help us to see individual growth as a journey with a narrative. Through archetypal stories of ordinary heroes and their trials, myths provide models, often in the form of rituals, to help us understand that it is possible to liberate ourselves from our own limitations.<sup>2</sup>

The rituals around rites of passage often build on foundation myths. Birth, naming, puberty, marriage and burial are the most important rites of passage in life. Holding a prominent place in the communities of primitive tribes and ancient civilizations, rites of passage were often an extreme exercise in severance, when young people left behind attitudes, attachments and life patterns and moved to the adult stage. Their purpose was to teach the individual to die to the past and be reborn to the future.<sup>3</sup>

Rites of passage - a term first used by French anthropologist Arnold Van Gennep in the early 20<sup>th</sup> century - have long interested scholars who study the way our lives unfold. They consist of three phases: pre-liminal, liminal and post-liminal; the Latin root *limen* signifying 'meaning'.<sup>4</sup> Joseph Campbell - an American scholar known for his thinking and writing on comparative religion and mythology - conceptualized a rite of passage as a *mythological adventure of the hero* who goes through three cycles: departure, initiation and return.<sup>5,6</sup>

Campbell noted that every hero follows the same path through trials and adventures. For both Van Gennep and Campbell, transitions are expressed as the death of an old order followed by a period of change. If the hero finds his way through the trials and rites of passage, he emerges with a stronger sense of his place and purpose in the world. A modern but classic tale of the hero's journey is recounted in the early Star Wars films—indeed the producer, George Lucas, said he was inspired by Joseph Campbell's work.

The typical hero's journey or rite of passage follows an individual as he (the reality is that women have always embarked on similar journeys, but I use Campbell's inclusive "he" here) embarks on an adventure, whether intentionally or against his will. Along the way he encounters helpers as well as resources required to win battles, follows various trails, and finally crosses a threshold.<sup>7</sup> There are two key transitions a hero must complete: first he has to move into zones of psyche where difficulties dwell, clarifying and eradicating them. In this psychological battle he fights demons and ogres,



slashes the ego, and finally dies to the world as he knew it, to be reborn as an eternal man: perfect, unspecific and universal. The second feat is the return home in his transfigured form, where he will share with society the lesson of renewed life acquired during his adventure.

In brief, Campbell presents the phases as shown in Table One, below.

I. DEPARTURE (OR SEPARATION)	II. INITIATION	III. RETURN (INTO SOCIETY)
<ul style="list-style-type: none"> <li>• The call for adventure</li> <li>• Refusal of the call</li> <li>• Supernatural aid</li> <li>• Crossing the first threshold</li> <li>• The belly of the whale</li> </ul>	<ul style="list-style-type: none"> <li>• The road of trials</li> <li>• The meeting with the Goddess</li> <li>• Woman as the temptress</li> <li>• Atonement with the father</li> <li>• Apotheosis</li> <li>• The ultimate boon</li> </ul>	<ul style="list-style-type: none"> <li>• Refusal of the return</li> <li>• The magic fight</li> <li>• Rescue from without</li> <li>• The crossing of the return threshold</li> <li>• Master of two worlds</li> <li>• Freedom to live</li> </ul>

**Table 1. Campbell's Rites of Passage: Cycles and Stages**

In comparing mythological adventures from oriental, occidental, ancient primitive and modern societies, Campbell finds that the threads underlying the human experience are common and universal:

*“For the heroes of all time have gone before us; the labyrinth is thoroughly known; we have only to follow the thread of the hero-path. And where we thought to find abomination, we shall find a god; where we had thought to slay another, we shall slay ourselves; where we had thought to travel outward, we shall come to the centre of our own existence; where we had thought to be alone, we shall be with all the world.”<sup>8</sup>*

### **Rites of passages in modern times**

The metaphors in Campbell's description of the cycles and phases of the hero's journey, when applied to stories of professional transition, help to illuminate the challenges inherent in mid-life or mid-career exits from the corporate world. In modern society, whether we realise it or not, much of what we do involves rites of passage, with thresholds across which we transition. The new moral codes and rights emerging from a globalized society may have changed the nature of some of these transitions (birth may now be planned, puberty marked by graduation ceremonies, independence by moving out of the parental home, and so on), but their primary purpose is still the same: rites of passages are the milestones that mark life's journey.

Long intervals often follow the main rites of passage (birth, naming, puberty, marriage to burial). These are integrated with a series of rituals that gradually

introduce the individual to “the forms and proper feeling” of his new state and prepare him to move to a new one, so that when the person reaches the new plateau, “the initiate will be as good as a reborn.”<sup>9</sup> The longest interval among the main rites is that between marriage and death. In modern society this interval is interspersed with a series of other rites: the first job, the first house, the birth of the first child, divorce for some, for others re-marriage, the empty nest, grandchildren, retirement, aging, and finally death.

Similarly, the journey of an individual who enters a career transition can be considered a rite of passage. The world of work is probably the place where transformation and transition happens at the fastest speed. This is a consequence of a more competitive, technological and globalized environment combined with a redefinition of the historical roles of “man the breadwinner” and “woman the caretaker.” Career advancement no longer consists of a series of promotions inside an organisation, nor are individuals bonded to one profession alone. The ceremonial rites of passage from corporate life into retirement - the traditional dinner, homage to one’s career achievements, audio-visual record and testimonies of old friends and colleagues, the speeches, laughter and tears - are being replaced by emails communicating that a senior manager or partner in mid-career has decided to leave to pursue “new interests.”

The term “career” used to be associated with continuous growth and progress inside a single organisation, area of interest and profession. In their contemporary form, careers are now broader and often more fractured. Today, individuals seek work that provides meaning and purpose, not simply financial reward and security. Changes in the modern career landscape have also impacted how job transitions are conducted and perceived by society; a person in a career transition today is seen as someone who is exploring new horizons, and no longer someone “out of work”.

A successful career is now evaluated over a lifetime, with “success” measured objectively (remuneration, corporate growth or hierarchical status), as well as subjectively (career and job satisfaction).<sup>10</sup> A misalignment in the relationship between objective and subjective success - in other words, when a person feels that the demands for achievement and the focus on objective measures of production begin to compromise his or her own subjective measures of satisfaction - is the main reason for career transitions.<sup>11</sup>

Career transitions are also triggered by *events* such as a global financial crisis and by strategic moves, as well as *non-events*—when something that was expected or desired (a promotion, a pregnancy) does *not* happen.<sup>12</sup> In

other words, a transition may be anticipated, expected and scheduled (graduation from college), or unanticipated and unpredictable (divorce, natural disaster). But independent of its catalyst or magnitude, most important for the individual is not the transition per se, but its impact on his or her life. Transitions are best experienced when the individual is able to go through a parallel process of assimilation and appraisal as he or she moves into, through, and out of the transition. A person's ability to cope will depend on the type of the transition, the context in which it happens, the extent of the impact, and their energy, strategy and courage.<sup>13</sup>

## **METHOD**

I adopt the framework of rites of passage described above to better understand the transition from corporate world to an independent career. Through the analysis of the narratives of seven senior corporate managers who exited their corporations for an independent career, I identify the paths present in their transformational adventures, comparing them to the hero's archetypal adventure.

I used narrative analysis, a qualitative research methodology, for data collection. Detailed, in-depth interviews were conducted with a group of seven individuals who had participated in INSEAD's Executive Master in Consulting and Coaching for Change program, and had made the decision to exit and pursue new independent careers. The names used here - Peter, Marike, Helene, Liviu, Wim, Natasha, and Christophe - are pseudonyms used to protect anonymity.

Each of the participants in my study had worked more than ten years in a global or regional corporation; had developed a successful career in an organisation; was between 35 to 50 years of age when they exited corporate world; had officially left the organisation at least one year prior to the interview; expressed no intention of returning to corporate world; and finally, they are all European.

## Key Findings and Discussion

### First cycle: Departure or Separation

*The Call to Adventure* begins the hero's journey. For Marike, Helene and Christophe, coincidentally all working in the financial industry, the global financial crises of 1998 and 2008 threw them into turbulence and adventure. For Natasha and Peter, a change in their life routine in the form of parental leave or a new job acted as the stimulus. As Natasha noted, maternity provided an opportunity for her to "figure out something", while for Peter, the boredom of a new job triggered the realization that his current career path "would be more of the same thing." For Liviu and for Wim, the Call came as a sign that something was in danger. For Liviu, the danger was his future career perspective, which provided "a clear signal which told me... the clock count started... I need to prepare something." For Wim, it was a wake-up call related to his health: "I suddenly felt a very strong headache one night while driving, and had difficulty concentrating on the road. My vision blurred and I just could not drive anymore... I thought I was having a brain attack."

**Refusal of the Call.** Sometimes the hero denies a future change and transition, and tries to preserve current ideals, virtues, goals and advantages. Refusal may turn the adventure into a negative one instead of a potentially life-enhancing experience. It can slow down or even inhibit the beginning of the journey. Likewise, the sense of refusal may occur when the adventure is already underway and the hero hesitates in the face of the challenges encountered along the way. Helene expressed difficulties in letting go through her continued emotional attachment to the company she worked for. For Natasha, business acted as a delay mechanism: in moments when she could reflect and think, she realised that she had to "do something to jump out of this thing". But when she went back to her busy work mode "nothing happened." For Peter, the insecurities that accompanied change held him back initially: "If I left the corporate world, we would be short of money until I built my business."

**Supernatural Aid.** The hero is usually accompanied by some form of aid - strangers, amulets - that provide guidance, incentives and support to continue the journey. Within the sample group of executives in this study, the aid came in the form of mentors, friends, colleagues and family members who served as protective figures.

According to Liviu, he was able to run his own consulting company because "my wife is strongly behind me and she supports me in doing all this work, and this requires a significant investment. The same happens with my father who

supports me in this venture.” For Marike, friends and colleagues were, in addition to being a source of information and advice, a safety net that protected her throughout her life. Books, films and special skills were also mentioned as having a strong impact, and could be likened to amulets that helped them to face the challenges.

***Crossing of the First Threshold.*** This is the moment in the journey when the hero crosses the boundaries of the known world. The interviewees expressed fear and anxiety about exiting the corporate world. “I was pretty terrified... it was a painful process” (Natasha). For some, family wellbeing and responsibilities, or bosses and corporate culture, acted as the guardians of the first threshold. For Marike, her boss was the threshold guardian between the old and new world: “My boss and I were like two ships crossing the ocean at night, knowing the other one was sailing alongside. Of course I realised that there was an end date to this whole situation, but I wanted to play it in such way that I could leave on my own terms not on their terms (whatever their terms would be), so I started to make noises, and gradually, like playing chess, the pieces moved into position.” At times, the threshold guardian was the individual him- or herself. According to Peter, “I was procrastinating. I was waiting for my parents to say “Do it!” I was waiting for my wife to say it. I finally realised that it was not for them that I was doing it; it was for me. I was in the driving seat, and I was the one to decide when to do it.”

***The Belly of the Whale.*** Once the hero has crossed the first threshold and entered the unknown world, he dies to the past and moves not outward but inward. All interviewees reported a period of retreat that followed the decision to move out of the corporate world. For Wim, the incubation period took the form of writing a book, while Marike used it as an opportunity to learn new things via different projects. Christophe’s retreat was the most dramatic; he left everything behind and moved to another continent looking for a new space for his transition.

### **Second cycle: Initiation**

***The Road of Trials*** is characterized by a succession of trials and challenges. As a person transitions out of corporate life, the constant challenges and battles of the professional career are replaced by the trials of the inward journey. For Natasha and Wim, who had voluntarily decided to leave the corporate world, the trials came in the form of temptations to return: “I left, but then a well-known American company made me an offer. Oh no! I made the exit, it was so painful, it took me a year of negotiating... and then I was back again!” (Natasha). Other trials included a second baby (Natasha); health problems of a close relative (Liviu); the search for a new working identity

(Peter); and for meaning: “I have a wish to find my passion. I want to wake up in the morning and say, Yes!” (Christophe).

***The Meeting with the Goddess.*** This is the encounter with one’s ego, ambition and vanity. In the interviewees’ narratives, seduction took the form of the allure of the lifestyle and power intrinsic to corporate life, and the excitement of moving up the corporate ladder. Many of the interviewees recognized their own high potential and the benefits that came with their rise to the top. “I had a chance to do what every consultant dreams of: to completely redesign the whole IT system in a new direction, and hire the best people on the market. The chairman invited me to be the CIO. I became a friend of the king, I was at the top.” (Liviú). For Marike, her corporate achievements were a sense of pride: “I was the first of only two women to ever be appointed to the group management board of the company. It was a public announcement; it was in the newspapers.”

***Woman as the Temptress.*** While the Meeting with the Goddess represents an encounter with one’s ego, the Woman as the Temptress is an encounter with one’s own vulnerability, humanity and mortality, as well as the fear and insecurity of starting something new. These were moments when the interviewees’ tone of voice became low, introspective and reflective. Although Natasha recognized her achievements in the corporate world, she also realised their limitations: “The corporate world is not me. I stayed in the corporate world because I thought if I do not have a structure I would fall apart. I had this belief inside me that I could not be on my own.” Likewise, she expressed a fear of failure which held her back: “If I do *not* do it, I will *not* fail... but then I think: what I am doing is not the real me.” Likewise, Peter expressed his insecurity on embarking in a new direction: “I had my ‘black’ Monday, with all these doubts. I told myself I could always return to the organisation.” Christophe likened this phase to being adrift: “I was floating over an open ocean. I already left the shore; I could not return.”

***Atonement with the Father.*** According to Campbell, this requires “an abandonment of the attachment to ego itself, and that is what is difficult.” At this point, the individual has faced survived all the trials and is ready to be born again. The interviewees referenced this stage in their narratives with thoughts of being reborn to the new self with a sense of peace and confidence in their decisions and new direction. Natasha described the confidence she possessed when it was time to negotiate her exit: “I was able to do it (negotiate the exit) and I was able to do it in a very good way, not aggressive and not passive, but assertive and confident.” Likewise, Marike recounted that when her position was going to be made redundant: “I was happy to leave because the whole culture they created did not appeal to me. I left it on my

own terms.” This phase is also marked by self-affirmation, as illustrated by Peter: “Today this is me. The alignment is perfect. My personal goal is my own; I am my own boss. I do not need to tell myself: leave me alone.”

***Apotheosis.*** Free from all fear of change, the individual who has reached the Apotheosis is liberated and is ready to help and support others. Natasha explained that she planned to help others who are going through similar transitions. “When people leave the corporate world, they always feel devaluated, even if they were not made redundant. I used to say to my clients: Maybe sometimes you will feel devaluated, but you have golden ingots: you own what you had achieved in the corporate life, your skills, your competence. These golden ingots are in your safe deposit and will always be there.” Likewise, Liviu expressed plans to set up his own consulting company to help “companies that are in trouble or going through major transitions, like mergers or acquisitions.”

***The Ultimate Boon.*** In the last stage, the world left behind is gone and at the same time renewed, revived, and is the foundation for new life. For Natasha and Liviu, their corporate experience was a positive one that contributed to their renewal. According to Natasha, “There are no hard feelings to the corporate world. It gave me structure. I achieved a lot in a short time. I have no hard feelings. With corporate life behind me I say: “Well I could do that, so yes I could do other things. I will not fall apart.” Likewise for Liviu, who expressed a clearer wisdom and fortitude going forward: “I am now in a very interesting position. I brought myself to where I want to be. I am ready to run my show now. I am ready to start the next 20 years of work and of my personal mission in life. I have a mix of confidence and anxiety as well. I know that I am strong enough to go this way, but also very conscious about all the dangers and pitfalls that could happen.”

### **Third cycle: The Return**

The last phase of the rites of passage is Return. However this does not always happen as a natural sequence of the adventure. It may also be marked with doubt and hesitation.

***Refusal of the Return.*** The hero has completed his initiation and is ready to live a superior existence, but when he returns he finds that those around him have not changed. Disappointed and alone, he isolates himself and does not complete the last cycle of the adventure, which is reintegration into society in a renewed form. For the group of people in this study, it was not possible to identify any verbatim that could be associated to the Refusal of the Return. It



would be interesting, however, to revisit this theme with the group in years to come.

***The Magic Flight.*** Even when the hero spontaneously decides to return to the world, this is not an easy journey. Helene publicly confronted the ‘big boss’ during her exit negotiations: “I confronted the CEO of one of the banks during a lunch when we were discussing the takeover. He was not listening to my points, so I asked him how he felt when people call him ‘Fred the Shred’? I know he knew his nickname, but I was the first one to confront him with it in public.”

Wim adopted a more positive approach to his process of exiting his company to preserve future supporters: “I want to manage my exit in such a way that I would not ruin my contacts internally and also outside the firm. I want to leave the firm differently, because the firm has a kind of negative track record when partners leave. When partners leave, it is always under trouble and stressful feelings and negativity about each other. This is not a process one would like to have when exiting the corporate world.”

***The Rescue from Without.*** Many times the hero has to be “rescued” from the adventure, in other words, he may need external validation. Peter and Wim received positive feedback from highly regarded professionals who helped them complete an important stage of their adventure. In Peter’s case, a leadership course that he was going to give served to boost his confidence: “I planned a workshop on leadership for partners of law firms, together with the managing partner of one of the major law firms. I met with a partner who was very impressed with the outline of the course. I said to myself: ten days ago I thought I could not do it, and now I got this seal of approval that I can do it! This is going to be great for my visibility as well as for my confidence.”

***The Crossing of the Return Threshold.*** The hero who returns after having lived a transcendental experience must find a reason to re-enter a world of banalities. For Liviu, it was the act of putting together a collage of his adventures: “I have just finished a collage with everything that happened in the last years, all the memories of this period, pictures, phrases, documents etc. It is concluded. Now I am ready to progress.” For Wim, the symbolic act would be the publication of his book that marked the conclusion of his adventure: “The book was a milestone on the transition process of going from the corporate world to the independent world: a point of no return!”

***Master of the Two Worlds.*** At this point, the adventure is close to its end. The hero has mastered his skills and now lives with the duality of existence.



There is no right or wrong, black or white. Natasha recognized this duality while struggling about what to write on her business card. Wim shared that being independent is on the one hand a solitary experience, but at the same time is a life of making temporary alliances with companies and other individuals: “So now I have to live with two selves. I need a business card but I am reluctant to have one.” He is able to reap the benefits of both worlds: “I also know that working independent doesn’t directly mean that I have to work by myself. I can make alliances with consulting firms and private persons.”

***Freedom to Live*** is the last stage of the hero’s adventure. The hero has crossed all thresholds, progressed through the different stages, triumphing over trials, and is no longer anxious about the outcome of his deeds. He is now “the champion of the things becoming”. The adventure is concluded. Marike’s assessment of her life after she made the transition from corporate to an independent career illustrates the freedom she found in her new working identity: “Ahhh... unbelievably good! I could not imagine after leaving the corporate world that I could build a totally different and independent career. But it could not have happened without corporate life; that was a big surprise to me.”

## Conclusions

Since the mid-1990s there has been a significant increase in the number of professionals who, after having a successful corporate career, embark on a transition towards an independent career. The traditional concept of a career as a series of advancements in one profession or one company is becoming less relevant in an era of continuous change and transition. Contemporary notions of a career are broader, and people seek work that provides meaning and purpose, as well as challenges and opportunities to shape and pursue their own path.

This study showed that career transitions from the corporate world to independent careers are similar in many ways to Joseph Campbell’s description of the hero’s journey and Van Gennep’s rites of passage. Despite its primitive roots, the concept still provides a useful understanding of the modern rituals that guide the journey from one stage of professional life to another. The journey of the modern hero - or heroine - is still replete with human emotions, and still provides a pathway for the genesis of new meaning and renewed purpose in life.

*“We no longer desire and fear; we are what was desired and feared.”<sup>14</sup>*

## About the Author

For 25 years Laércio Cardoso worked at Unilever as a global executive, having lived in Brazil, Pakistan, India, Indonesia and China. Currently he is a managing partner at MindPartners, a marketing strategy consulting company. He is also a teacher at ESPM in São Paulo, where he teaches marketing, and has just started a DPA at Fundação Getúlio Vargas.

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<sup>4</sup> Van Gennep, A. (2004). *The Rites of Passage*. London: Routledge.

<sup>5</sup> Campbell, J. (Ed.) (1993). *The Hero with a Thousand Faces*. London: Fontana Press.

<sup>6</sup> Campbell, J. (1993); Campbell, J. (2004); Campbell, J. (2011).

<sup>7</sup> Campbell, J. (2008).

<sup>8</sup> Campbell, J. (1993:25).

<sup>9</sup> Campbell, J. (1993:10).

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<sup>12</sup> Anderson, M., Goodman, J. and Nancy S. (2011). *Counselling Adults in Transitions: Linking Schlossberg's Theory with Practice in a Diverse World* (4<sup>th</sup> ed.). New York: Springer.

<sup>13</sup> Anderson, M., Goodman, J. and Nancy S. (2011).

<sup>14</sup> Campbell, J. (1993: 162).

# Imposter Phenomenon During Professional Transitions

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Inge Maes

## The Starting Point

The theme for this paper was born out of my own personal transition, when impostor thoughts and feelings kicked in big time. I felt I was “outing” myself as a participant in INSEAD’s EMCCC program (“How on earth did I get through the admission process—perhaps for diversity reasons?”) and, as a practitioner, having to do research for the first time (“Research? Yeah, right, who am I kidding?”). At the same time I felt I was disclosing my personal insecurities by pursuing this subject (“Now for sure my colleagues and classmates will find out I am a fraud!”) The positive and encouraging reactions I received during my research project surprised me, but also confirmed that this topic was of interest. In a way, this was my first finding and it encouraged me to reach out to a broader audience to further understand the phenomenon.

## Idea in Brief

The *impostor phenomenon* occurs when individuals who are perceived to be successful by others fail to see themselves as successful or intelligent. Impostor thoughts and feelings have been linked to a number of wellbeing outcomes, namely emotional turmoil and stress and organisational affective commitment or job satisfaction. Research for my paper, conducted with 242 respondents on the prevalence and effect of the impostor phenomenon, revealed that:

- Imposter thoughts and feelings are *frequently present* in individuals going through professional transitions, with some evidence suggesting that women experience impostor thoughts and feelings more frequently than men.
- Imposter thoughts and feelings are *taboo* and not often openly discussed. As such, people often suffer in silence.

- Impostor feelings and thoughts have an *impact on general wellbeing*, mainly on affective commitment.
- People report a need to *acknowledge impostor syndrome as normal and part of the transition process* more than a need to “fix” the syndrome. The act of open acknowledging it provides a much needed sense of relief.
- *Reflection and open and honest feedback* can also help “impostors” manage the fears and anxieties associated with such feelings and thoughts.

### **Idea in Practice**

I conducted an action research workshop to explore the impostor phenomenon in greater detail and to identify strategies to manage it. The first objective was to build legitimacy for impostor thoughts and feelings through awareness and acceptance. The second objective was to create a supportive environment where people could share experiences. Post-workshop evaluation and feedback indicated that the group setting provided a basis for social comparison where participants could help one another make sense of the ambiguous feelings and contradictory experiences generated by impostor thoughts, try out a more self-confident possible self, and work on internalizing their new professional identity. There was an acknowledgement of the need to introduce the concept of impostor thoughts and feelings early on to on-board leaders for current and future transitions. Introducing this concept to “first time managers” early in their careers, and cultivating the skills of self-reflection and acceptance that comes with managing it, could have a substantial effect on how they undergo future transitions and how they guide and coach the people and teams they lead.

## Introduction

In today's work force, professional transitions are part of everyone's reality. Virtually everyone will undergo one or several transitions, such as moving from academia to industry, from individual contributor to managing people, from employed to unemployed to re-employed, starting up a business, taking on a new project, or changing company, industry, country or boss. Navigating these transitions successfully, and potentially supporting others in the transition process, is an on-going challenge in any professional career.

The imposter phenomenon was first described by Clance and Imes in 1978 in a study of high achieving women.<sup>1</sup> It was later defined by Clance as an "internal experience of intellectual phoniness,"<sup>2</sup> whereby objectively competent and successful individuals - women and men - reported feeling secretly inadequate and fearing detection of their incompetence. Because they perceive themselves as "bluffing" their way through life, they are haunted by the constant fear and anxieties of exposure.

Impostor feelings of phoniness have been shown to have an effect on behaviours in the workplace such as feeling depressed, anxious and having a low level of self-esteem.<sup>3</sup> A high level of self-consciousness limits a person with impostor feelings from being open to the outside world and to react (and lead) accordingly. It undermines both their sense of confidence and competence. The feeling of intellectual inauthenticity may also stifle innovation as individuals might not take risks for fear of exposure and miss out on creative thoughts and out-of-the box ideas.

Because of the fear of detection, impostors are apprehensive in situations in which their competence is implicitly or explicitly evaluated.<sup>4</sup> Such fears can create extreme emotional turmoil, with "imposterism" correlated moderately with depression, neuroticism, and suicidal ideas.<sup>5</sup> Impostors also have difficulty internalizing their successes and behave in ways that maintain their imposturous feelings.<sup>6</sup> They tend to attribute their successes to factors such as luck, exceptionally hard work, or being in the right place at the right time; while at the same time dismissing praise, and other information that would validate their competence and worth.<sup>7</sup>

### **The impostor phenomenon during profession identity transitions**

The concept of identity has been described as the various meanings attached to oneself by self and others,<sup>8</sup> which in turn are based on the social roles and group memberships a person holds, as well as the personal and character traits they display, and which others attribute to them. Professional identity combines both personal and social identities, and represents a relatively stable and enduring constellation of attributes, beliefs, values, motives and experiences by which an individual defines him- or herself in a professional role.<sup>9</sup>

During professional role transitions, identity undergoes a metamorphosis as people are faced with new working identities and have to adapt aspects of their identity “to accommodate role demands and modify role definitions to preserve and enact valued aspects of their identity.”<sup>10</sup> During the *separation phase* of a professional transition, people “try on” their new role, which they might not yet fully identify with. Others, however, may perceive them as fully assuming that role and all the expectations that come with it, which is when impostor thoughts and feelings may arise. During the *transition “in between” stage*, also defined as a liminal period, people may experience acute conflict due to identity ambiguity<sup>11</sup> in which a person either lacks a clear role identity, or alternatively, experiences a “multiple-defined self, whose multiple definitions are incompatible.”<sup>12</sup> Thus, the lack of a clear sense of self or the presence of conflicting or incompatible old and new selves can lead one to feeling like a fraud. The third stage of identity work involves resolution of multiple selves and the *incorporation or internalization* of a new identity. As long as impostor thoughts and feelings exist, it will be very difficult to reach the end of this last stage, which is full identification with a new role.

### **The impostor phenomenon and organisational commitment**

Impostor thoughts may arise if the professional transition is perceived as an over-reward. In situations of perceived over-reward, the impostor phenomenon will be associated with negative affective commitment, or lower personal fulfilment from their job. The impostor phenomenon is also positively associated with employee continuance commitment, or concern with the costs associated with leaving the organisation. In other words, people suffering from impostor thoughts and feelings fear failure, but the “costs” associated with leaving their position may outweigh their fear of failure, and thus they remain in their position. It is possible that although over-reward may result in higher levels of performance, this could come at the expense of job satisfaction and increased stress.<sup>13</sup>

## **METHOD**

My research explored the prevalence of impostor thoughts and feelings during role transitions, and its effects on a number of organisational outcomes, and whether there are distinct gender differences. An online survey was conducted with 242 respondents, of which 54.4% were women and 45.5% were men. 91% of the respondents had people management experience, with 45% reporting more than 10 years of management responsibility.

After the survey, a half-day workshop based on the principles of action research was conducted with 15 participants. Action research requires that participants work together to reflect on personal experiences, solutions and discoveries. The objective of my impostor syndrome workshop was to identify concrete ways in which to improve how professional transitions are experienced and managed, with a focus on the effect of the impostor syndrome during transitions. Follow up interviews were conducted two months later.

## **Key Findings and Discussion**

Three attributes are central to the impostor phenomenon: feeling like a fraud, fear of being un-masked, and discounting praise and denying competence.<sup>14</sup> My survey results show that the impostor phenomenon is indeed pervasive during role transitions.

- Of the 230 respondents, 68% worried at least sometimes that others would find out that they are not as bright and capable as others think they are this, with 15.3% worrying often or always.
- Over 70% worried at least sometimes about making a mistake or not doing things perfectly (although generally they do well when taking on a new role or project), with over 30% worrying often or always.
- 51.6% believed sometimes that it was luck, serendipity, being in the right place at the right time, or knowing the right people, rather than ability that got them their new role/project, with 18.7% saying this was often or always the case.

- Over 62% found accepting compliments or praise about their intelligence or accomplishments in their new role/project sometimes difficult, with 25.5% finding this often or always difficult.
- 14 out of the 15 workshop participants shared that they experience imposter thoughts and feelings during transitions.
- There were gender-specific differences, with a greater percentage of women respondents worrying about being found out or making mistakes and reporting more negative effects than men.

The sense of taboo around imposter thoughts and feelings was also confirmed by the survey results. Only about 25% of respondents reported that they could openly discuss impostor thoughts and feelings with others. The majority (67%) felt less open to talking about this issue (38.7%) or not at all (28.3%).

The interviews conducted after the action workshop also revealed how pleasantly surprised and relieved participants were to be able to share their impostor-related experiences with others. As one participant noted: “... there was something hidden, and we discovered it. What was new for me was that others talked openly about it and perhaps that gave me the courage to also talk about it.”

This creates an interesting, almost paradoxical situation. People typically do not feel safe sharing such vulnerability, as they believe they are the only ones experiencing it. But once they started sharing, this opened up the path for others to open up and create a shared feeling of relief, openness and connectedness. The contrast of the negative affect - the emotional pain of silently suffering impostor thoughts and feelings - versus the positive impact of talking about it with others, came out clearly when interviewing the workshop participants. Not only was there a strong sense of “I am not alone,” but the shared information also made their feelings seem more legitimate.

Another interesting finding from the survey data was that impostor thoughts and feelings appear not to have a clear negative impact on performance or to stop people from taking on new challenges. Only around 10% of individuals suffering from impostor thoughts and feelings admitted an effect on their performance, with 26.5% reporting improved performance and 47.8% reporting no change. Additional feedback from survey and workshop respondents suggested that participants were not looking for tactics to remediate impostor thoughts and feelings. Rather, it was more important for



them to be aware of and accept the existence of impostor thoughts and feelings, to understand that they were not alone, and to have a safe place to openly discuss their feelings so as to allow for a sense of relief. One respondent noted:

*“There is no need to overcome these thoughts and feelings as I classify these as part of a ‘normal’ experience when taking on new projects/during transition—VERY essential to experiential learning and thus, success.”*

Likewise, another expressed the relief of merely acknowledging its normality in order to be able to push on:

*“It’s normal that you feel lost in the beginning. It’s there and can be accepted, it’s not wrong, it’s OK. Knowing about this theory will help me relax, and to be more open and willing to accept new challenges.”*

Another survey respondent also noted that it was important to have a safe space to address anxieties and concerns:

*“If these feelings do exist, create a safe environment in which to discuss these feelings. It’s not necessary to overcome them, just make it safe to express them.”*

Imposter feelings are often felt *during* a professional transition, but not after. Indeed, 90% of the respondents reported that when looking back at their career, they considered themselves capable and competent in the roles they had. Surprisingly, looking forward, it seems that having experienced impostor thoughts and feelings rarely stopped a majority of respondents (78.7%) from taking on a new project and role. Thus, one of the tactics to deal with such feelings is related to “looking back.” Both survey respondents and workshop participants suggest that a combination of self-reflection (“What have I done well in the past?”) and getting open and honest feedback from a boss and/or a trusted mentor can help alleviate anxieties about competence and failure.

In contrast with the correlation of impostor thoughts and feelings with indices of psychological distress, including depression, neuroticism, and suicidal ideation,<sup>15</sup> the survey data indicate that the effect of impostor thoughts and feelings on respondents’ general wellbeing was *less negative than expected*. Almost 10% described a positive effect and 35% reported a neutral effect. However, since 41% reported a negative effect, the potential benefits of offering these individuals ways to deal with impostor thoughts and feelings are worth considering.

## Practical Implications

The complex reflections one has when feeling like a fraud or impostor seem to contrast with the seemingly simple actions one can undertake to deal with such feelings, as well as the immediate impact of such actions.

The first action is to build legitimacy for impostor thoughts and feelings through awareness and acceptance. The feeling of relief (“I am not alone”) when becoming aware of such feelings and their prevalence seem to be key in triggering personal reflection and creating awareness.

A second action, related to the first, is to create a shared space in a supportive environment where one can share experiences related to the impostor phenomenon. A group setting, like a workshop, provides a basis for social comparison where co-participants serve as a peer reference group. The reference group validates how one feels and creates the kind of psychological safety that encourages people to experiment. The group setting of the workshop was also important because successful changes in oneself are often instigated, motivated or supported by others. Self-concept change depends on enlisting other people to lend social legitimacy to the desired changes.<sup>16</sup>

Additionally, professional role transitions should be supported by experimentation with possible selves. Role transitions “require new skills, behaviours, attitudes, and patterns of interactions; they may produce fundamental changes in an individual’s self-definitions.”<sup>17</sup> A workshop that helps individuals deal with impostor thoughts and feelings can ease the transition period in which people linger between old and new identities. When participants share their stories, each one creates a personal narrative that helps him or her to internalize a new professional identity. These stories help participants to make sense of the ambiguous feelings and contradictory experiences (negative self-image versus positive feedback from others) generated by impostor thoughts.<sup>18</sup>

Finally, there is a need to introduce the concept of impostor thoughts and feelings early on in the onboarding process to prepare leaders for current and future transitions. Introducing the impostor syndrome to professionals early on in their career could have an important impact—influencing how they manage their own career transitions, and how they guide and coach the people and teams they lead. Longer term, the increased self-awareness will equip them to avoid the dysfunctional behaviours associated with strong impostor feelings

as they assume increasingly senior roles, in which they may well have an influence on the entire organisation.

## Conclusions

As mentioned above, the theme for this paper was rooted in my own experience of the impostor phenomenon. By researching the subject and sharing and hearing similar stories during the action research workshop, I realised that clearly I was not alone. My personal learning was to realise the beauty and promise of such states of transition: a healthy dose of self-awareness can make this journey of “getting there” much richer. Each time a person thinks “Phew, I am not alone, this is normal,” a little ripple of relief and self-awareness is created. My wish is that this reflective process will help us to learn to wonder at, rather than worry about such thoughts and feelings.

## About the Author

Inge Maes graduated from INSEAD’s Executive Master for Coaching and Consulting for Change program in 2014. She first worked as a veterinarian in Belgium before moving into the pharmaceutical industry in Switzerland in 2002. After 6 years in R&D, she took on her first role in human resources. She has worked with teams in China, India, US, UK, Switzerland and Central and Eastern Europe. Currently she is the Country HR Head in Germany for Novartis.

<sup>1</sup> Clance, P. R. and Imes, S. A. (1978). “The Imposter Phenomenon in High Achieving Women: Dynamics and Therapeutic Intervention”, *Psychotherapy: Theory, Research & Practice*, 15 (3), 241-247.

<sup>2</sup> Clance, P.R. (1985). *The Impostor Phenomenon. Overcoming the Fear That Haunts Your Success*. Atlanta, Georgia: Peachtree Publishers Ltd.

<sup>3</sup> McDowell, W., Boyd, N. and Bowler, W. (2007). “Over-reward and the Impostor Phenomenon”, *Journal of Managerial Issues*, 19 (1), 95-110.

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<sup>8</sup> Ibarra, H., Snook, S. and Ramo, L. (2008). "Identity-Based Leader Development". *INSEAD Working Paper*, INSEAD.

<sup>9</sup> Schein, E.H. (1978). *Career Dynamics: Matching Individual and Organisational Needs*. Reading, MA: Addison-Wesley.

<sup>10</sup> Ibarra, H., Snook, S. and Ramo, L. (2008).

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<sup>12</sup> Baumeister, R. F. (1998). "The Self." In G. L. Gardner (Ed.), *The Handbook of Social Psychology* (4th ed.). New York: McGraw-Hill, pp. 680–726.

<sup>13</sup> McDowell, W., Boyd, N. and Bowler, W. (2007).

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<sup>15</sup> Leary, M. (2000).

<sup>16</sup> Baumeister, R. F. (1998).

<sup>17</sup> Ibarra, H., Snook, S. and Ramo, L. (2008).

<sup>18</sup>Ibarra, H. and Barbulescu, R. (2010). "Identity as Narrative: Prevalence, Effectiveness, and Consequences of Narrative Identity Work in Macro Work Role Transitions", *Academy of Management Review*, 35, 135-154.

# Commentary on Part One

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Transitions in working identities, while common, can be destabilizing, particularly when a person is in a position of organisational leadership. It can be very difficult for leaders to find time for self-reflection, to gather honest feedback from a group of trusted peers, and to take the distance and perspective needed to evaluate options and test new alternatives. In-company workshops and off-site or academic executive development programs often serve as the kind of transitional space that both Cardoso and Maes describe.<sup>1</sup>

Cardoso mentions that all of the people he interviewed during his research had participated in a multi-modular program that spanned 18 months. This type of program is typically designed for mid- to high-level professionals in their early 30s to late 50s. Thus it should come as no surprise that people join executive education programs not only for the content, but also for another, often undeclared motive, which is to create the time and space to take stock of their life and explore their personal agenda.<sup>2</sup>

The design of this type of workshop facilitates a cohort or group journey, during which individuals feel protected by psychological, physical and temporal boundaries. In other words, the transitional space created by the group enhances the unique transitional experiences - rites of passage - of the individuals within the group.<sup>3</sup> Peers in such programs often provide important feedback as well as essential support.

## What lessons can be drawn?

As Cardoso's and Maes' works illustrate, we should accept that professional development and career transition often involve what has been eloquently called "a paradoxical co-existence of coherence and ambiguity."<sup>4</sup>

- The contemporary concept of career is broader than ever before, and constantly evolving. People seek work that provides meaning and purpose. These two facts imply that professional transition is common and frequent.

- Professional transitions can be described as rites of passage, with phases of separation or ending; in-between-ness; and incorporation or renewal of professional identity.
- Transition is replete with human emotions—hope, fear, anxiety, and so on.
- The emotions generated by professional transitions can affect wellbeing.
- Creating a shared space to acknowledge and explore the emotions generated during professional transitions gives these emotions legitimacy.
- Understanding that one is not alone triggers awareness and acceptance of such emotions.

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<sup>3</sup> Korotov, K. (2005). “Identity Laboratories.” INSEAD PHD Dissertation, Fontainebleau, France: INSEAD; Haynes, K., Grugulis, I., Spring, M., Blackmon, K., Battisti, G. and Ng, I. (2014). “A Two-Year Stretch: The Functions of an Identity Workspace in Mid-Career Identity Work by Management”, *Journal of Management Inquiry*, 23 (4), 379-392.

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PART TWO

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# INTO THE LABYRINTH



A fundamental factor that influences professional transitional experiences is the way in which organisations do, or do not, recognize or channel them. For the individual, for the organisation, or for both, the passage may be disappointing, thwarted or antagonistic. What are the hidden elements that come into play?

Rites of passage may prompt organisational members to uncover, develop, and legitimize a new professional identity that is no longer aligned with, or is not legitimized by, the home institution. A growing sense of dissonance or misalignment between self-perceived and institutionally perceived identities can be disturbing, both for the individual and the organisation. A pertinent example is the transition into senior leadership roles, where an individual might feel overlooked or underestimated if he or she can't attain career objectives that seem merited. Lack of fit between the individual's changing abilities and needs and the organisational demand and supply helps to explain why *many people leave their organisation after mid-career periods of stock-taking and transition.*<sup>1</sup>

Part Two takes us across the threshold of the organisational labyrinth, into the "in-between" phase of transition where our organisational "heroes" often encounter chaos and ambiguity. We look at some of the issues that prevent organisational actors from fully realizing their potential, including a lack of role models, entrapment in the status quo, a pattern of repeating behaviours that no longer make sense, and missed opportunities to revisit and revise biases about leadership.

In particular, we delve deeper into prevalent biases about ascribed gender roles and expectations. The implicit understanding of what it means to be a leader is usually associated with so-called masculine behaviours, as encapsulated in the "think leader-think male" bias. Accordingly, many organisations have a "24/7 total commitment" work culture that supports and reinforces these biases. Deviation from expected behaviour in organisations has consequences for both men and women. This presents a very real impediment to individuals - men and women - who no longer want to be boxed in by such narrow constraints, and are looking for change and alternative pathways.

It is important to be aware of and call out these biases. In this section, the chapters by Natalia Karelaia, Karen Barry and Lesley Symons name what is *already obvious, but still taboo*. The authors also describe the implications of such strict demarcations for leader identity as well as the motivation to lead. Their research shows that gender stereotyping is endemic in organisations and not enough has been done to challenge it.

Natalia Karelaia's paper lays the theoretical foundation, as she explores the antecedents and consequences of *women leaders' identity interference* related

to the perceived conflict between their roles as both women and leaders. She also explores the effects of identity interference on women leader's collective self-esteem, psychological wellbeing and motivation to lead.

Karen Barry's chapter looks closely at identity interference in situ; she studied the *glass-ceiling effect in South Africa*. Her findings in the field lend credence to Karelaia's proposal that women feel they have to work harder to prove their commitment to their leadership role, and that some of the barriers they experience are self-imposed.

Lesley Symons' chapter on the *invisibility of female protagonists in business cases* highlights one of the root causes of the pervasive "think leader-think male" bias that continues to run deep in organisations. In her research, Symons found that the absence of women protagonists in widely-used business school case studies is not even noticed by MBA students or other readers, male and female alike. This chapter raises the possibility that business schools are partly responsible for the scarcity of senior women leaders at the top of organisations, and for perpetuating a gender bias that is limiting to both men and women.

<sup>1</sup> Haynes, K., Grugulis, I., Spring, M., Blackmon, K., Battisti, G. and Ng, I. (2014). "A Two-Year Stretch: The Functions of an Identity Workspace in Mid-Career Identity Work by Management", *Journal of Management Inquiry*, 23 (4), 379-392; Edwards J.R. (2008). "Person-Environment Fit in Organisations: An Assessment of Theoretical Progress", *The Academy of Management Annals*, 2, 167-230; Schneider B., Kristof A.L., Goldstein H.W. and Smith D.B. (1997). "What is This Thing Called Fit?" In N.R Anderson and P. Herriott (Eds.) *Handbook of Selection and Appraisal*, 2nd Edition. London: Wiley, pp. 393-412.

# Identity Challenges of Women Leaders

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Natalia Karelaia

## The Starting Point

The idea for this study came from a personal observation that sometimes women in leadership positions seem to be trapped in an identity conflict created by stereotypes about how they should behave. In an attempt to fit with their male colleagues, they try to behave the way they think may make them look like a leader. However, doing so may also make them feel less authentic. I wanted to explore this phenomenon and to understand how such an identity conflict could be alleviated.

## Idea in Brief

Women leaders feel pressured to accommodate their behaviour to the conflicting demands arising from beliefs about how women and leaders should behave. These competing demands can generate identity interference or identity conflict: Am I a woman or a leader? Can I be both? Although attitudinal barriers to women's advancement to leadership positions have attracted scholars' attention, little empirical research has examined how women leaders conceive of themselves as women and leaders. This research is among the first empirical efforts to document *women leaders' identity interference and to examine its effect* on women's psychological wellbeing and professional motivation. Survey responses gathered from 722 women (alumni from two business schools) reveal that:

- Identity interference of women leaders is negatively related to the percentage of women in the organisation and the amount of managerial experience the women leaders have.
- Identity interference has undesirable effects on the wellbeing (life satisfaction and stress) of women leaders, but collective self-esteem (i.e. women's positive regard for their gender identity) buffers the negative effect of identity interference on life satisfaction.

- Identity interference affects women leaders' motivation to lead by reducing the pleasure of leading and increasing the sense of duty to persist in leadership roles.

### **Idea in Practice**

The findings of this study demonstrate that identity interference does have important consequences for women leaders' psychological wellbeing - increasing stress and reducing life satisfaction - as well as for their motivation to lead. It also demonstrates how gender demographics of organisation and leadership experience can counter the negative effects of identity interference.

## Introduction

Companies enthusiastically embrace the idea of increasing the number of women in top management, citing fairness as well as economic reasons. However, to advance in modern organisational hierarchies, women must cope with “second generation” gender biases—that is, subtle obstacles rather than overt discrimination.

These obstacles include structural barriers<sup>1</sup> such as women’s underrepresentation in traditional structures of organisational power<sup>2</sup> and the resulting limited access to informational networks.<sup>3</sup> Moreover, attitudinal barriers - both individual attitudes toward women leaders, and the way in which women leaders perceive themselves - contribute to the gender gap in leadership positions.<sup>4</sup>

In this chapter I examine the intrapersonal attitudinal obstacles to women’s advancement to leadership positions. I focus on women leaders’ self-perception and, more specifically, on whether they believe that a conflict exists between their personal and professional identities.

### **The role of organisational acceptance**

A leader’s identity is co-constructed by the leader and his/her followers through the process of claiming and granting leader and follower identities in his/her social interactions.<sup>5</sup> Thus, whether other members of the organisation see a woman as a leader is essential for her ability to internalize her leader identity. In other words, the perceptions of others shape self-perception.

A paucity of female role models within an organisation may also signal to women that they are in the “wrong place” and thereby strengthen their leader identity interference.<sup>6</sup> Thus it is especially challenging for women to validate their leadership in male-dominated organisations, where leadership is - by default - defined and assessed in masculine terms as well as numerical representation.

### **The role of leadership experience**

Building a leader identity also entails a process of adaptation to leadership role requirements and integration of the leadership role with the individual’s value structure.<sup>7</sup> When the adaptation process is successful and the individual progresses within the organisation, his/her leader identity solidifies and properly integrates into the individual’s broader sense of self.<sup>8</sup>

Women who succeed in adapting and subsequently achieving high-status organisational roles may be perceived as highly effective because they had to be extraordinarily competent to have met the stricter requirements applied to women (so-called “double standards”).<sup>9</sup> Thus women with more experience in leadership tasks are likely to perceive less interference between their identities as a *woman* and as a *leader*.

### **Identity interference and wellbeing**

Holding multiple identities that one perceives as complementary enhances creativity,<sup>10</sup> increases one’s opportunities to self-affirm,<sup>11</sup> and helps one to effectively cope with daily failures.<sup>12</sup> Integrating professional and personal roles not only enhances self-acceptance, self-esteem, and life-satisfaction but also serves to enrich one’s repertoire of leadership skills.

However, the perceived dissonance between the meanings of different identities that one holds can lead to negative psychological outcomes, such as stress and diminished wellbeing.<sup>13</sup> For women leaders, the greater the perceived interference, the more they will feel (or, perhaps, sense at a subconscious level) that the act of leading constitutes a threat to their deeply-rooted gender identity<sup>14</sup> which in turn can result in more stress and lower levels of life satisfaction.

### **Identity interference and motivation to lead**

If women construe leadership behaviours as “inappropriate” for women, in other words, as behaviours that result in social disapproval and internal conflict, they will be less willing to commit to their leader identities. Conversely, there are several reasons to believe that identity interference may enhance women’s sense of duty to lead. First, women leaders assume a more prevention-oriented approach, whereby they seek to avoid others’ disapproval.<sup>15</sup> Second, women may reduce negative affect (emotion) by withdrawing from leadership roles. Alternatively, they may integrate motives related to others - for example, future generations of women - and thus persist in leadership roles even when such roles feel personally unpleasant. I thus suggest that women leaders who are aware of gender-related barriers may feel that they must persist in leadership positions precisely because of the difficulties. That is, they feel a duty to challenge the current status quo that is unfavourable to their social group.

### **Mediating effect of collective self-esteem**

Collective self-esteem includes both how positively one evaluates the goodness of one's social group (private regard) and how positively one believes that others evaluate the social group (public regard).<sup>16</sup> I propose that with increasing leadership experience, women leaders develop a more positive view of the "leaders" social group.

Similar to personal self-esteem, collective self-esteem related to gender and race has been shown to contribute to psychological wellbeing.<sup>17</sup> Women's collective self-esteem has been shown to moderate the relationship between perceived gender discrimination and resulting psychological distress.<sup>18</sup> Correspondingly, I hypothesize that women leaders' private regard for their female identity will buffer the negative effect of identity interference on women's wellbeing (life satisfaction and perceived stress).

### **METHOD**

Survey responses were collected from 722 women (alumni from two business schools) between 26 to 68 years old, from diverse ethnic, educational and professional backgrounds. The majority of participants (76%) were employed by organisations where men represented more than 50% of employees across all levels. The survey measured four dimensions: *Identity interference* (the degree to which being a women and being a leader were perceived to interfere with one another, adapted from Settles<sup>19</sup>), *Subjective wellbeing* (5-item satisfaction with life scale<sup>20</sup> and 4 items from Cohen et al's perceived stress scale<sup>21</sup>), *Motivation to lead* (9-item affective-identity motivation to lead scale and 9-item social-normative motivation to lead scale<sup>22</sup>) and *Collective self-esteem* (Luhtanen & Crocker's collective self-esteem).<sup>23</sup>

### **Key Findings and Discussion**

This research highlights the negative effects of second-generation gender bias. Results show a direct link between women's proportional under-representation in organisations and the identity interference they experience. In male-dominated organisations, women leaders may more often be "reminded" of the incongruity between their professional and gender roles.<sup>24</sup> My findings show that membership in a minority group (being a senior woman executive, for example) contributes to a less positive view of the way other

people value that minority group. This tends to exacerbate women leaders' identity interference.

The findings also show that women's private regard for their gender identity buffers the negative effect of identity interference on their life satisfaction. It is possible that a high regard for their gender identity allows women to self-affirm and thus protects their self-views from stressors.<sup>25</sup> While this is consistent with previous research on the protective effect of positive social identities against perceived discrimination,<sup>26</sup> to the best of my knowledge it is the first study to document the shielding effect of women's collective self-esteem against the perceived incongruity between their roles as women and leaders.

This research provides a fresh perspective on the antecedents of the motivation to lead. Perhaps most surprisingly, I found that identity interference increases women's social-normative motivation to lead—that is, the feeling of duty to attain and persist in leadership positions. This implies that women who are aware of gender-related barriers may be motivated to alter the status quo to facilitate career advancement for future generations of women. One participant commented that changes in the general perception of women's competencies and commitment needed to be carefully managed “in order not to impair the progress of the next generation.” This empirical evidence opens new directions for future research regarding sense of duty and connectedness - with both past and future generations - that seem to play an important role in women's motivation to lead.

## Conclusions

This study looks at the antecedents and consequences of women leaders' identity interference related to the perceived conflict between their roles as both women and leaders. The results extend current knowledge regarding the productive management of multiple identities by suggesting that women leaders' motivation to lead may be enhanced if organisations emphasize the valuable characteristics of leaders that are compatible with women's self-schemas. Significant benefits - at both the individual and organisational levels - can be achieved when individuals structure their multiple identities in ways that emphasize their complementarity and connections.<sup>27</sup> Moreover, “female” interpersonal qualities such as collaboration, care, inspiration, and interpersonal sensitivity should be seen as important,<sup>28</sup> and should underpin leadership behaviours for women *and men*.



The results imply that authenticity and an appreciation for belonging to the social group of women are fundamental to the developmental task of integrating leadership roles into women's core selves. As expressed by the respondents, it is important "to be yourself and enjoy your work," "to keep your own personality", and not to conform to "the image of what a manager should be like".

## About the Author

Natalia Karelaia is an Associate Professor of Decision Sciences at INSEAD, where she teaches negotiation and managerial decision making. Before joining the faculty at INSEAD, she was an Assistant Professor at Université de Lausanne, Switzerland. She received her PhD in Management from Universitat Pompeu Fabra, Barcelona, Spain, and was a visiting scholar for the Program on Negotiation at Harvard University.

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# The Glass Ceiling in South Africa

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Karen Barry

## The Starting Point

As a woman in the South African banking industry, I never had the opportunity of entering the boardroom or moving up the corporate ladder during the period of apartheid. Post-apartheid I hoped that this would change. Unfortunately, this has not happened for many women. In my research, I wanted to understand why this is still the case.

## Idea in Brief

The way women themselves see the phenomenon of the *glass ceiling* can be divided into two broad categories: those who see it as a fact, in that they believe that it is a very real, albeit invisible, barrier; and those who believe that it is a myth and a self-inflicted barrier. Limited research has been done in the *South African banking environment* on how women in the banking sector experience the glass ceiling effect. There is even less coverage of their experiences of the glass ceiling - the potential barriers or obstacles in their environment - and the organisation's role in facilitating or inhibiting upward mobility. There is also a *pervasive process of self-sabotage* among women that exacerbates the problem.

The findings of my research show that for the group of South African women in my study:

- The glass-ceiling effect is a fact. All women reported having encountered this effect, with the main obstacles being implicit gender-based role expectations and biases.
- Women experience greater family-work conflict than men due to entrenched social norms concerning gender roles.
- Such conflicts affect the choices and promotability of women. Women are often perceived as being less committed to their work roles than men due to their dual family and career focus.

## **Idea in Practice**

- The findings from surveys and interviews suggest a number of ways to help women manage the glass-ceiling effect.
- Some of the tension women face in organisations revolve around managing work-life balance, as women seek to fulfil the demands and responsibilities at work and at home.
- Many of the women in this study cited a need for talent management programs designed specifically for women.
- Build a supportive organisational climate with flexible work arrangements.
- Conduct ongoing review of job performance evaluation criteria for advancement.

## Introduction

The glass ceiling can be defined as an intangible barrier that determines the heights that women can reach in their careers in organisations in which they are employed. The words “glass” and “ceiling” both conjure up a transparent barrier, and ironically, many women do not realise the existence and effect of the glass ceiling until they come up against it.

The glass ceiling is rooted in social norms, organisational culture and structures, which limit women’s access to leadership positions and authority in organisations and society.<sup>1</sup> The term “glass ceiling” was originally coined to describe the specific type of labour market disadvantage encountered by women and minorities in advancing to the top positions in organisational hierarchies. However, the glass ceiling phenomena is not only limited to gender inequality in managerial representation; it is also about the challenges which women experience in their endeavour to reach the top.

The glass ceiling effect is often used to refer to elite positions which women can see (glass) yet cannot reach (ceiling). This means that large numbers of ethnic minorities and women are prevented from achieving the highest, and most lucrative, executive positions. Not only is the glass ceiling an external barrier, but pervasive gender and leadership role expectations may also limit women, as some opt out of pursuing higher management positions due to perceived incompatibilities in terms of personal competence and organisational fit.

Most South African banks claim to have eliminated discrimination by ensuring that more qualified and talented women are found working alongside their male counterparts as economists, actuaries and chartered accountants. And yet the glass-ceiling phenomenon clearly still exists. In South Africa the phenomenon has been investigated by many,<sup>2</sup> and yet little has been reported on the extent of the problem, or attempts to change matters.

## METHOD

This study focused on women leaders in middle to senior management roles, at the same financial institution in South Africa, who reported having experienced the glass ceiling effect at some point in their career.

Within the sample, there were five white and 11 mixed-raced respondents. Of the 16 respondents, 13 were married and the others were divorced, single or separated. Of the 13 married respondents, four were the family breadwinners. The women were surveyed and interviewed about their experience throughout their careers.

## Key Findings and Discussion

Findings from both surveys and interviews show that the glass ceiling still exists for some, whereas for others it may be a self-imposed myth. Barriers included the challenge of overcoming implicit gender-based role expectations and bias, managing both work and home responsibilities, and working in a male-dominated environment.

All of the respondents (except one who was the only person to occupy the role since its creation) experienced the effects of the glass ceiling, whether in their current roles or in previous roles, due to barriers which were external in nature as well as self-imposed.

Barriers to the progression of women's careers include an organisational culture that promotes gender-specific norms, organisation practices, communication forms, view of self, approaches to conflict, values and definition of success and good management.<sup>3</sup>

There is also a more *pervasive process of self-sabotage*: women may harm their own career progression through avoiding selection. It has been argued that people are attracted to jobs that are in line with their own preferences and values.<sup>4</sup> Women who see their own values in conflict with those of the dominant male organisational culture may choose not to pursue managerial roles and in doing so limit their advancement.<sup>5</sup>

Company *policies and practices* are also often instrumental in creating barriers for female progression to higher levels of management.<sup>6</sup> Companies

find it difficult to administer, implement and maintain equal employment opportunity policies and the failure of such policies can also demotivate female employees despite their skills, commitment and experience. These policies are often implemented with great expectations: women are allocated a mentor or coach with specific timelines in place for each step of the process to enable them to advance in their career. The policies fail, however, when they do not compel or allow the mentor or coach to see the process to completion, leaving the women feeling disappointed or discouraged.

Many of the respondents advised that it was a combination of the aforementioned barriers (rather than a single barrier) that prevented them from reaching their full potential in their career path.

In addition, the predominantly masculine culture of South African banking organisations also created tensions. The respondents felt that practices by their male colleagues were definitely more covert than overt and that *the “old boys club”* was alive and well. The subtle inferences by their male colleagues -that a “woman’s place is in the kitchen and not the boardroom” and that “a woman should know her place: behind a desk taking minutes and pouring the tea in boardrooms” - created feelings of being undervalued, incompetent and utterly frustrated.

This study also revealed that women struggle with managing home and work roles due to entrenched barriers, cultural values, and role expectations. Women face *barriers of limited mobility* if they are married and are offered a position in another province or even just another city.

At the organisational level, subtle gender discrimination practices deselect women for a potential position if it involves relocation. The underlying assumption is that a woman with a family will most likely not be able to relocate, although this assumption is not applied to male candidates. Thus, even though executive and middle management jobs are available to both genders, the underlying criterion in choosing the applicant is often subtly gender biased, and based on stereotypes of expectations of what constitutes male “breadwinner” and female “caregiver” priorities.

The fact that their husband’s role and income also has to be taken into account limits career progression for senior women executives. Another limiting factor was that if their children were doing well at school, or attended a special needs school, women were not prepared to put themselves first and would decline relocation or greater career responsibility. This has led to the



perception that women are not as committed to the organisation as men, and are less stable due to the fact that their focus is both on family and career, whereas men appear to be more singularly career-focused.

Finally, it emerged from this study that women from *staunch religious backgrounds* were most affected by having to choose between being the family caretaker versus the breadwinner, as they felt a lack of support on the home front due to the embedded belief that their primary role was the family caretaker. This led to an even greater feeling of guilt: although they had to work to supplement the family income, their place should be at home with their families.

## **Practical Implications**

An important finding is that the glass ceiling still exists. This study was *not* conducted in 1970 among secretaries or factory workers—the study shows that today well-educated senior women executives working in a dynamic economy continue to struggle with internal and external gender biases that hamper their full contribution.

There was general consensus among the group of interviewees that a *talent management program designed specifically for women* should be implemented within the banking fraternity as a whole. This should include a balanced reward scheme, coaching, mentoring, and networking opportunities. They specified “creating platforms for understanding the connotations of inhibiting self-growth” and that “leaders should not pay lip service but should rather be the example of the transformational changes and thus inspire and create a climate in which women would thrive.”

Another suggestion was to build a *supportive climate* where women are able to fill multiple roles; that of career person, wife and mother without the perceptions of being less committed. This includes flexible work policy and to provide the support required to enable women to achieve. Flexible work arrangements, affordable child care centres that are on-site or in close proximity to workplaces, and greater work-family flexibility and development opportunities by the organisation could help women cope with the barriers imposed by the glass ceiling, and mitigate its effects. Ongoing review of job performance evaluation criteria and criteria for advancement could also reduce the effects of the glass ceiling.

None of the measures above are new, and there is ample proof that they are effective. Yet in the final analysis, what remains utterly frustrating to many men and women is that these measures are so infrequently put in place. This points to a stark reality: there needs to be a change of culture within the banking structure such that a person is employed on merit and on “what you know, not who you know.” Astonishingly, the old boys’ club mentality is still prevalent and still holds women back. Equally surprising, and discouraging, is the way in which women sometimes sabotage their own careers. A positive and inclusive climate for all women in business needs to be built and maintained in response to their endeavours to reach the top.

### About the Author

Karen Barry has been in the banking environment for the past 32 years. She has held various positions from the most junior position, and is currently employed in an executive position at a banking institution. Her interest in the topic was piqued by her own experiences of the glass ceiling and the psychological and emotional impact that it had on her at different stages of her career.

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# Writing Women into Business School Case Studies

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Lesley Symons

## The Starting Point

The push for more women in business and in leadership positions is ever present. Business schools play a vital role in achieving gender diversity in leadership and on boards. However, if you take a walk around most business school campuses, what you will see is a majority male student cohort, few female students, few female professors and few women protagonists in the MBA/EMBA course material. This bothered me—a lot.

## Idea in Brief

The main teaching tool at business schools is the case method approach, lauded as a way of enabling students to learn to lead and connect theory with real-life experiences. For this study, 74 award-winning and bestselling case studies from 2009-2015 were analysed on how they represent women. Findings show that:

- There is a systemic lack of female lead protagonists and an overall absence of women in case studies.
- Case studies portray a “male” model of leadership and perpetrate second-generation gender bias.
- The lack of women in case studies, as professors or on boards, together with a largely male student cohort at business schools, reinforce the status quo and undermine female managers’ ability to establish their own leadership identity.

## Idea in Practice

Business schools should play a vital role in promoting gender equality in organisational leadership and on executive boards. Although they profess to promote gender balance in organisations, in some ways business schools

preserve the status quo. The reality is in the numbers: female professors are few, case protagonists are overwhelmingly men, and in the student body men are almost always in a strong majority. This suggests that stereotypical “male” leadership qualities are reinforced by business schools. The implicit message – for both female and male MBA students – is that to succeed they must conform to the masculine “norm.” For women MBA students, who obviously have much to contribute as future executives, not only are they in the minority, but they are virtually invisible in most of the teaching materials and models of leadership presented.

Clearly, business schools need to analyse and understand the explicit and implicit gender messages that all parts of the organisation and its programs convey, and what role they play in maintaining the status quo. Current MBA case studies, by their very nature, impede debate about the roles of both women and men in organisations—one would think these are important issues for business schools.

## Introduction

Business schools around the world use the case method approach as a tool for learning on MBA and executive education programs. The case method is heralded as a way of enabling students to learn to lead and to connect theory and practice through discussing real-life leadership and organisation challenges.<sup>1</sup> In this study, I analysed award-winning case papers written or published from 2009 to 2015 from the Case Centre.\* I was curious to see how many times a women occupied the role of lead protagonist, and how often women were mentioned across all case studies.

My findings are disturbing. In the overwhelming majority of case studies, the “think manager – think male” scenario prevails: most cases have a male lead—and a white Western one at that.<sup>2</sup> When women *are* present in case papers, they are often cast in secondary roles.

However, I am pleased to report that my theme is garnering attention. On August 5th 2015, the White House convened the Business Community on Expanding Opportunities for Women in Business. In conjunction with this event, 45 business schools committed to a best practice document<sup>3</sup> that gives concrete examples of ways to help women succeed in these schools. Among other recommendations, the document mentions that case studies need to be more representative of today’s workplace, “showing women in significant line management roles and/or as the main protagonist.”

### Leadership identity development in business schools

Leadership development is promoted as one of the key reasons for attending business school programs.<sup>4</sup> Indeed business schools are uniquely placed to challenge individuals on the way they work, and to model leadership styles in a way that challenges stereotypes.<sup>5</sup> The MBA context - taking time away from the familiar environment and normal constraints of life - offers the possibility to practice and experiment with new ways of “doing” and “being” as a leader.<sup>6</sup> As such, business schools are becoming “identity workspaces” where people reflect on their career development or professional transition.<sup>7</sup> In theory, this is an ideal setting in which to address leadership stereotypes. Indeed MBA program designers are becoming more vocal, and more careful, about

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\* The Case Centre, previously known as the European Case Clearing House (ECCH), was originally set up in 1973 and is recognized by business schools as a leader in distributing case paper materials and an expert in case teaching and learning.

diversity. And yet very few people - students, faculty, or administrators - have ever questioned the lack of women in the most entrenched and formalized pedagogical tool of the business school classroom: the case study.

## **METHOD**

The study analysed 74 award-winning and best-selling studies published over a period of seven years by the Case Centre (CC). Written by faculty and research assistants, the case studies are by far the most widely taught cases in business schools around the world. My research focused on how these award-winning case studies represent women. Attention was given to the gender of the lead protagonist as well as how women were described, and the roles they played. A thematic analysis approach was used to identify overt and covert messages about women leaders, as well as reoccurring themes across the cases.

Incidentally, I encountered some resistance as I explained the research. The topic was met by apathy—in the form of comments such as, “Yes, we are aware that there are not many women in case studies,” followed by explanations why that was so, and why nothing could, or should, be done about it. When I interviewed students, many of them, particularly male students, were antagonistic. My graduation speech on the topic was received neutrally – to put it mildly – by the associate dean. It was as if I had uncovered something like an unpleasant smell that people preferred to live with rather than deal with.

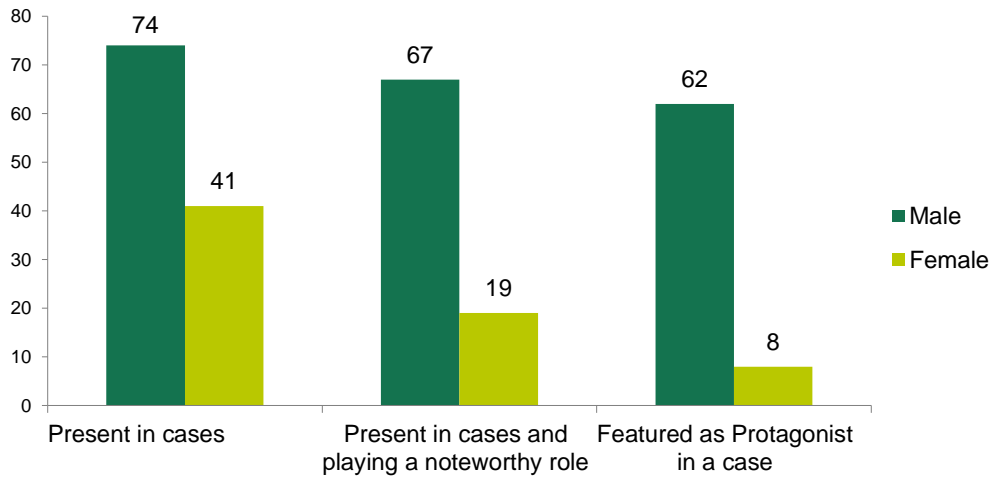
## **Key Findings and Discussion**

A deeper analysis of the 74 cases revealed three common themes: (1) Few women in case studies, (2) Think manager/think male leadership attributes, and (3) ‘Pink’ (traditionally associated with women) areas of work.

### **There are few women in case studies**

Among the 74 case studies, women were absent from 33 (45%). Women featured as protagonists in only eight case studies. Even more startling: two of those eight female protagonists turned out to be men in real life. (One case author who felt there weren’t enough cases featuring women, had intentionally changed the name/sex of the protagonist). Taking this into consideration, *only*

six of the 74 award-winning and best-selling cases describe the leadership of a female protagonist—about 8% (see Table 1).

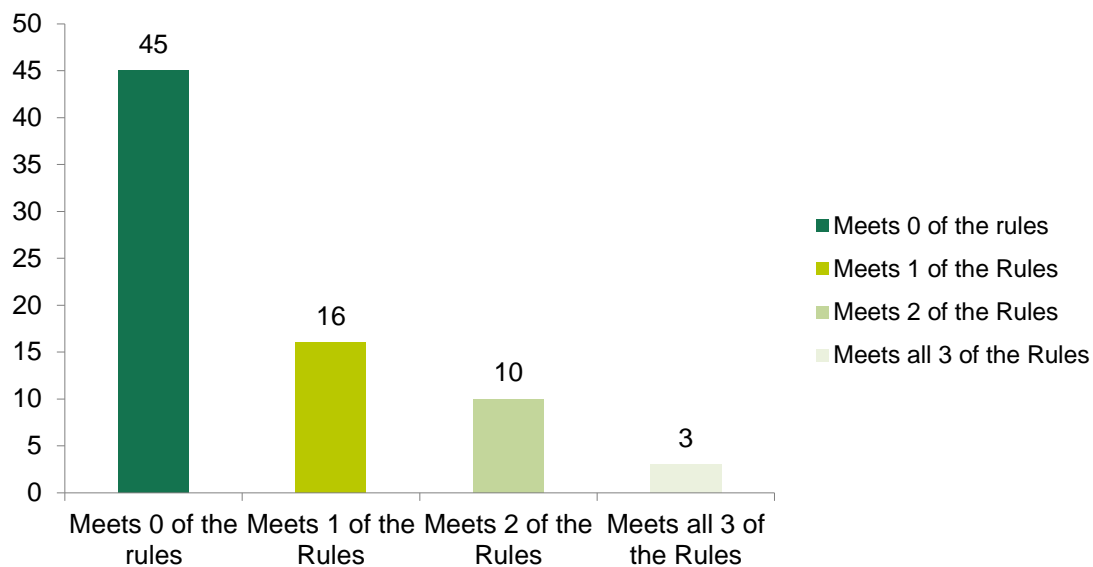


**Table 1. Gender representation in case papers**

There is clearly a systemic lack of female lead protagonists and an overall absence of women in case studies, confirming how primary teaching materials that are in widespread use in business schools are maintaining the gender bias status quo.<sup>8</sup> Neither MBA students nor business school faculty write women into leadership—literally.

Influenced by the famous Bechdel Test that looks at the presence of female leads in movies,<sup>9</sup> I subjected the cases to the “Symons Test” to determine the active presence of women in each paper: each study must include (1) at least one woman, (2) in a leadership position (the protagonist), (3) who talks to another woman about the business.





**Table 2. Symons Test results**

Of the 74 papers, 16 passed the first measure and ten papers passed the first and second. Only *three case studies* (4%) met all three criteria—and in two of these, the women protagonists were originally men. The overwhelming majority, 45 cases (61%), did not meet any of the Symons Test measurements, providing incontrovertible evidence of the invisibility of women in business case studies.

### **Men’s dominant presence in papers reinforce the “think manager – think male” model**

The majority of case studies feature more than one man. There are few women in cases that have a male protagonist. Leadership descriptions in all case studies substantiate the “think manager – think male” standpoint, for example “He liked fast motorbikes and thrash metal” and “A tough but fair manager—he was results-driven, disciplined, and demanded complete accountability from his team.” Other men were described as strong-willed and courageous.

Moreover, in four of the eight cases with a female protagonist, the supporting cast of male characters was given more space than the women leader. In five of the eight cases the female protagonist’s qualities were not described, although the case went on to describe the male leaders. In cases with male protagonists, qualities and characteristics were described. Second-generation gender bias was apparent in the cases. The papers implicitly indicated that even when present, women were somehow “less”.

What are the implications for the business school context? With so few female protagonists and women featured in case studies, added to a scarcity of female professors, predominantly male student cohorts and a “think management – think male” paradigm, there are a number of messages that all students, male and female, are subject to.

Because the business school climate and culture is predominantly male, gender stereotypes are reinforced for women students (who are in a small minority). As women are “invisible” or missing from this context, female management students may unconsciously feel that they don’t they belong: This is not the right place for me (as a woman).

Another implicit message they may be getting is the need to assume stereotypical male leadership qualities in order to become “invisible” by conforming to the “norm”. Within the program and the business school environment, the way leaders are portrayed in business cases continues to encourage female management students to take on “male stereotypes of leadership”.<sup>10</sup>

Being in the minority at business schools, women (including faculty) also become highly “visible” and are more vulnerable to criticism. This undermines female students’ motivation to experiment with leadership roles during their MBA experience and thus adds to their role identity conflict, the implication being that business schools and MBA courses may not provide “safe identity workspaces” for women.

These findings do not point an accusatory finger at men; indeed they suggest that men too are prisoners of a system that is detrimental to both genders. Messages that reinforce ideal or desirable “male” role models and leadership qualities undermine the ability of both men and women to accord leadership status to women. They also hamper men who display so-called “feminine” leadership behaviours. In addition, by reinforcing a norm, these messages dampen debate and critical challenges about the way business schools (individuals, professional bodies and organisations) theorize about and teach leadership.<sup>11</sup>

### **Women are associated with ‘pink’ areas of work in case studies**

‘Pink’ topics are those that are traditionally associated with women, such as:

- what was once known as “the four Fs”: food, family (relationships, children, sex), furniture (home), fashion
- female-focused subject matter, such as women’s health or culture<sup>12</sup>

I found that women were predominantly present in pink topics in the case studies analysed. In six of the eight cases that had a female protagonist, the industries could be clearly categorized as pink (family and/or woman-specific, fashion and/or woman-specific, food and furniture), whereas in case studies with a male protagonist the main topics were technology (internet, mobile and IT initiatives, etc.) 29%; food 20%; motor industry and transport 15%; family (health, retail and entertainment) 15%. Including a female protagonist in cases featuring companies within pink categories reflects an unconscious bias that these are the areas in which women are “normally” found and that they are not present in other areas of business.

## **Practical Implications**

The environment for women at business schools is predominantly masculine. By overlooking issues of gender and leadership in case studies, business schools enact gender biases and continue to maintain women’s invisibility, and thus perpetuate the status quo. This also reduces the critical and challenging debates that are so important to the learning environment and omits consideration of the value of both women’s and men’s leadership styles.

Business schools need to oversee the entire case collections used in their business programs and the gender messages they transmit—both via their courses and as institutions. If their genuine intention is to help women shatter the glass ceiling and build awareness of gender issues,<sup>13</sup> there is still much to do. From top leadership down, business schools need to understand the explicit and implicit messages about gender and leadership that all parts of the organisation send out to students, and what role the institution plays in maintaining the status quo.

The representation of women in senior positions is critical for the development of a woman’s leadership identity.<sup>14</sup> At business schools it includes role models among faculty and other senior positions, as well as increased student numbers. Without role models and other women in business, female management students may be affected at an early stage of their career by an unconscious bias that they “do not belong here.”

## About the Author

*Lesley Symons is a leadership coach and group facilitator. She has many years' experience leading organisations, and more recently set up The Case For Women, where she continues her research and consults and trains organisations on women and leadership.*

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## Commentary on Part Two

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Where do I fit in the organisation? Does anyone see me or want me? Why should I continue to work so hard if I don't see meaning or purpose in my role? Does the organisation really need me? If I try to lead, will anyone follow? Both men and women are adversely affected by the "myth of the ideal worker" or the "man in the grey flannel suit." If we write one group out of the leadership equation, then by definition we force the other group to shoulder the burden of it.

These questions point to an underlying anxiety about lack of fit between one's role in an organisation and one's internal sense of self-worth. This perception of misalignment can be subtle, as for women MBA students, or more flagrant, as for senior women executives. Women often feel that they are not legitimate organisational members, as Karalia points out.

Therefore women in organisations often take diametrically opposed default options: either they act on a sense of duty to attain leadership positions to facilitate career progression for other women, or they resort - albeit unconsciously - to self-sabotage, as Barry argues. Either way, the glass ceiling is still a reality in the workplace.

### **What can be done?**

Karelaia, Barry and Symons each propose solutions that are pragmatic and easily actionable. They are not even particularly new, but they challenge the established organisational paradigm "think manager – think male." Taken together, however, their fundamental premise can be seen as a call for intervention at multiple inflection points in the career progression of women and men:

- The first intervention, Symons suggests, should occur in business schools, where the "management science" approach to forming future leaders - as epitomized in the case study teaching approach - could be transformed to include women protagonists.
- The second intervention, as suggested by Karelaia, is for organisations to enhance women leaders' motivation by emphasizing the valuable

characteristics of leaders that are compatible with their self-schemas. This also broadens the scope of legitimacy for men, who can then experiment with leadership schemas that reflect their individual sense of self, rather than conforming to the “norm”.

- The third addresses the incontrovertible evidence that company policies and practices are instrumental in erecting barriers to women’s progression. Barry challenges us to go beyond the question of *What can be done in organisations to encourage women?* – there are already many policies that do help women – suggesting we look at the problem the other way around: *What is hindering women and creating barriers?* This is a trickier question, which, like the interventions suggested by Karelaiia and Symons, will require courageous action on the part of organisational leaders.



PART THREE

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# IDENTITY WORK



Part Three traces the dynamics that may hinder or facilitate identity work during the middle phase of the journey through the labyrinth. During this liminal, “in-between” phase, individuals experiment with possible new identities, moving back and forth between the old world and the new.

The chapters in this section explore the different dynamics at play that may hinder or facilitate the transition process for men and women. These dynamics are often unspoken, taboo, or hidden from awareness. When brought to the surface they present opportunities for facilitating personal development and growth, and carry implications for how organisations can support their people in adopting more senior roles.

Nathalie Depauw’s chapter on female leaders’ self-talk compares constructive and negative self-talk in the narratives of female directors and managing directors of banks. Her findings suggest that an adaptive strategy of positive self-talk during the transition from director to managing director can help to anchor their leader identity. Her work in the banking field concurs with earlier findings: as women encounter barriers in their journey to the top, their ability to lead presupposes that while often influenced by external forces, behaviour is ultimately controlled from within.

In India, as women gradually move into leadership positions both at home and at work, their roles and identity - in society and in the family unit - are being redefined. Sudha Anand’s paper on the transition of daughters into leadership roles and succession of Indian family firms shows how women are forging a new identity for themselves in many different and innovative ways. Caught between rising aspirations for a new worldview and role definitions and the persistence of centuries-old traditions, Indian women struggle to create a sense of psychological equality, respect and autonomy.

In particular, this section describes the middle phase of the labyrinth where traditional role models - as imposed by culture and family either internally or externally, or both - are explored and updated. Here, individuals experiment with possible selves and test the boundaries of their newfound freedom while attempting to preserve their own system of values.

# The Role of Self-talk in Transitions

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Nathalie Depauw

## The Starting Point

Having worked in the financial industry for 15 years, moving up the ranks ultimately to the role of managing director, I witnessed the progressive attrition of women especially at the managing director level, which is the antechamber to c-suite roles. This made me wonder why women are still being held back despite the efforts of banks to support their careers. I am also a runner and have many times noticed how my mental state and the way I talk to myself before and during a run shape my feelings, endurance, and even performance. I started to reflect on the influence of the inner mental states and conversations which can fuel us to reach personal goals—or make such goals harder to reach. This study grew out of the convergence of these reflections.

## Idea in Brief

Many organisational initiatives to accompany a woman leader's professional journey focus on skills needed to lead projects and to lead others. An undeveloped, but critical area, is how to lead oneself. One of the foundations of self-leadership is self-talk or “the dialogue through which the individual interprets feelings and perceptions, regulates and changes evaluations and convictions, and gives him/herself instructions and reinforcement.” Three female directors and three female managing directors from the bank sector shared their stories on their leadership experience. The following key findings emerged:

- Positive self-talk statements were more frequent in the Managing Directors' narratives than in the Directors'. Negative self-talk statements were more frequent in the Directors' narratives than in the Managing Directors'.
- The top five positive self-talk categories for both groups were building alliances, perseverance, self-reward, recognizing one's strengths and opportunity focus.

- The top four negative self-talk categories for both groups were should statements, all-or-nothing thinking, jumping to conclusions and over-generalizations.

### **Idea In Practice**

Self-talk can have a powerful influence on the inner dialogue of female leaders, which in turn have an effect on their leadership behaviours and transitions to more senior levels. The findings from this study show that Managing Directors display more positive self-talk than Directors, and that this skill might be underestimated for its importance in leadership transitions. The categorization of negative and positive self-talk may be used as a self-help or coaching tool to help leaders to become aware of their patterns of thinking as either constructive or self-defeating. Negative self-talk can be managed and reframed in a more positive way. Developing positive self-talk is also another key aspect in leadership development, but its ability to drive motivation towards performance has not been well documented in the existing literature.

## Introduction

Despite the number of initiatives introduced by international banks to support women's careers, (in terms of increased senior management sponsorship and accountability, work flexibility or leadership development programs), the percentage of women at the managerial level continues to decrease, and declines even further in top executive positions.

This study looks at the inner-self dimension of this issue, observing the nature of self-talk of women executives at the Director and Managing Director levels in banks, and how it may affect their thoughts, emotions, behaviours and ultimately their ability to transition to more senior roles. Self-talk is defined as “the dialogue through which the individual interprets feelings and perceptions, regulates and changes evaluations and convictions, and gives him/herself instructions and reinforcement.”<sup>1</sup> As explained later in this chapter, many academic studies have demonstrated the impact of self-talk on one's thoughts and emotions, and ultimately, on one's wellbeing and performance.

The purpose of the study is to categorize the self-talk of female banking executives, understand how it can either be an enabler or a weight in the pursuit of individual goals, and finally to determine which self-talk patterns differentiate Directors and Managing Directors, in an attempt to define what could be the key success factors from a self-talk standpoint in the transition from Director to Managing Director roles.

### What is self-talk?

Self-talk is anchored in social cognitive theory,<sup>2</sup> within which the idea of human agency plays a central role. Human agency is the belief in personal efficacy and power to produce desired effects: if one believes or thinks oneself as capable—or not, this will influence one's feelings towards challenges and affect subsequent behaviours. As such, a distinction is made between “self-enhancing” or “self-debilitating” thoughts or, in other words, between positive or negative self-talk.

Academic research has repeatedly proven over the past 30 years that the nature of self-talk affects motivation, perseverance in the face of difficulties, emotional wellbeing, vulnerability to stress and depression, and the choices one makes at important decisional points.<sup>3</sup>

## **Cognitive distortions: the root causes of negative self-talk**

The identification of patterns and psychological mechanisms of negative self-talk may be attributed to cognitive therapy, and particularly the research by Beck on depression and anxiety.<sup>4</sup> He explored the impact of dysfunctional thinking, which leads to 'arbitrary inferences', with a corresponding inability to accept alternative explanations, as well as 'selective abstraction', resulting in the person being fixated on negative aspects of the situation. He concluded that constructive self-talk is linked to a positive emotional state, while dysfunctional thinking leads people to see challenges as irreversible or unchangeable, which decreases their cognitive abilities and results in distorted thinking. Building off Beck's work, Burns described ten cognitive distortions and their emotional impact.<sup>5</sup> While initially defined to address depression, the concept has also been successfully applied to qualify negative self-talk for non-depressed individuals.<sup>6</sup> These include:

- **All or nothing thinking:** seeing things in 'black and white' categories.
- **Overgeneralization:** seeing a single negative event as a never-ending pattern of defeat.
- **Mental filter:** picking out a single negative detail and dwelling on it exclusively so that your vision of all reality becomes darkened.
- **Disqualifying the positive:** rejecting positive experiences by insisting they "don't count", for some reason or other.
- **Jumping to conclusions:** making a negative interpretation even though there are no definite facts that convincingly support your conclusions.
- **Magnification:** exaggerating negative things so they take on a disproportionate degree of importance, and minimizing positive things until they lose their importance.
- **Emotional reasoning:** assuming that one's own negative emotions necessarily reflect the way things really are.
- **'Should' statements:** motivating yourself with "should" and "shouldn'ts" and "musts" and "oughts".
- **Labelling and mislabelling:** instead of focusing on the circumstances surrounding the error, one attaches a negative label to oneself.
- **Personalization:** seeing oneself as the cause of some negative external event, which in fact one was not primarily responsible for.

## **Self-leadership and emotional intelligence: the backbones of positive self-talk**

Compared to the research on negative self-talk, very little research exists on positive self-talk. However, the ideas behind self-leadership and emotional intelligence may provide useful frameworks in order to describe and categorize it.

Self-leadership is “a process of behavioural and cognitive self-evaluation and self-influence whereby people achieve the self-direction and self-motivation needed to shape their behaviours in positive ways in order to enhance their overall performance”.<sup>7</sup> Applied to a professional context, people who are considered self-motivated workers are able to lead themselves and to take greater responsibility for their work behaviours. Self-leadership strategies are traditionally divided into three primary categories.<sup>8</sup> *Behaviour-focused strategies*, in the form of self-correcting feedback, involve identifying ineffective behaviours and replacing them with more productive ones. *Natural reward strategies* involve focusing on intrinsically rewarding aspects of a task in order to make the task more gratifying. Finally, *constructive thought strategies* involve reshaping mental processes to promote more positive and optimistic patterns of thinking. My study draws on Houghton and Neck’s scale, which further sub-divides these three categories to help classify positive self-talk.<sup>9</sup>

Emotional intelligence, which encompasses skills such as empathy, social responsibility and stress management, is equally crucial for describing and understanding positive self-talk. While there are several conceptual definitions of emotional intelligence,<sup>10</sup> they all share a common theoretical backbone. I refer to the classification of emotional intelligence traits by Bar-On<sup>11</sup> for this study.

### **How self-talk affects work performance?**

Self-leadership capacities are linked to improved wellbeing and performance at work.<sup>12</sup> These include increased productivity,<sup>13</sup> level of job satisfaction,<sup>14</sup> lower stress and anxiety,<sup>15</sup> lower absenteeism<sup>16</sup> and career success.<sup>17</sup> More specifically, a study by Rogelberg and colleagues conducted on executives concluded that: 1) constructive self-talk was positively correlated with leadership of others and negatively correlated with job strain; 2) dysfunctional self-talk was negatively correlated with creativity/originality; 3) dysfunctional self-talk was unrelated to job strain or leadership of others.<sup>18</sup> The third finding appears counterintuitive but might result from the focus of this study on

executives, for whom negative self-talk could lead to a loss of opportunity, as opposed to a negative outcome.

## **METHOD**

Three directors and three managing directors (between 34-45 years old, Caucasian, based in Europe or Asia) working in the bank sector were asked to provide a written narrative of their leadership experience. Thematic analysis was conducted on the narratives to determine predominant patterns of positive or negative self-talk, and to explain their mechanism, using the literature on cognitive distortions to elucidate negative self-talk, and the literature on emotional intelligence and self-leadership to explain positive self-talk.

Self-talk frequency and patterns were then compared between Directors and Managing Directors. The objective was to establish if positive/negative self-talk was respectively more/less prevalent for Managing Directors, and in doing so, possibly define which self-talk categories Directors could work on to progress to the next level in their career.

## **Key Findings and Discussion**

The key findings of the study are that positive self-talk is more frequent in Managing Directors' narratives than Directors' narratives. Conversely, negative self-talk is more frequent in Directors' than Managing Directors' narratives.

### **Positive self-talk is more frequent in Managing Director's narratives**

Positive self-talk was classified according to: 1) the *behavioural and cognitive strategies* defined by Houghton and Neck within self-leadership theories;<sup>19</sup> and 2) self-reported *emotional intelligence skills*, which include interpersonal skills such as adaptability, stress management and general mood dimensions as classified in the EQ-i<sup>20</sup> as well as intrapersonal skills.

In the narratives, positive self-talk statements are more frequent in Managing Directors' narratives (33 occurrences) than in the Directors' narratives (25 occurrences). The top 5 positive self-talk categories for both groups are:

**Building alliances**, defined as the interpersonal process of building relationships with others. Examples in the narratives include: "I had/still have

the benefit of a trusting relationship with one of the female MDs” and “Much energy has been used to explain, convince, on-board the local teams, plus find the human and managerial levers in order to allow the assignment to finally to kick off with a local team more or less aligned and cooperative.”

**Perseverance**, defined as the “ability to effectively cope with stressful or difficult situations.”<sup>21</sup> Examples from the narratives include: “Over the course of that year, I remained professional, courteous and helpful... However my patience and strategy paid off” and “Guided by the will to never give up and to overcome all hurdles... be patient and focused on your perimeter.”

**Self-reward**, defined as behaviour-focused strategies used to reinforce desirable behaviour and goal attainment.<sup>22</sup> Examples of self-talk emphasizing self-reward include self-congratulation ‘celebrate each victory’, ‘pride’ or ‘proud’, expressing satisfaction, and other positive self-reinforcing words such as ‘happy’ and ‘bravo’.

**Recognizing one’s strengths** is another behavioural strategy that involves paying attention to how well one is doing in one’s work as well as keeping track of progress. Examples of such positive self-talk in the narratives include: “I am very good at building my professional network” and “My actions enabled this success.”

**Opportunity focus** is linked to optimism or the “ability to remain hopeful and resilient despite setbacks”, and flexibility, which is the “ability to adapt one’s feeling, thinking and behaviour to change”.<sup>23</sup> Examples of these in the narratives include the use of words and phrases such as ‘adventure’, ‘take the risk’, ‘learning’, ‘open door’, and ‘keep eyes open’.

### **Negative self-talk are more frequent in Directors’ narratives**

Negative self-talk was classified according to Beck’s and Burns’ work on cognitive distortions and dysfunctions.<sup>24</sup> Negative self-talk statements were more frequent in the Directors’ narratives (36 occurrences) than in the Managing Directors’ narratives (20 occurrences). The top four categories of negative self-talk are:

**Should statements**, when one tries to motivate oneself with, “I *should* do this” or “I *must* do that”. Such statements may generate unnecessary emotional turmoil in daily life.<sup>25</sup> Examples in the narratives and potential interpretation include: “First and foremost, I *must* convince my management, demonstrate my ability to drive change [...] and gain commercial skills.” All



these professional goals appear sensible but the “must” in the sentence may imply at a deeper level that 1) these goals are self-imposed, and 2) if they are not achieved, the speaker has fallen short of her own self-imposed expectations.

Based on Burns’ work, two approaches may be used to motivate oneself in a more constructive way in a professional context. The first is to ask oneself questions aimed at challenging self-imposed “should” statements such as: Who says I should? Where is it written that I should? What are the advantages and disadvantages of having this rule for myself? Another approach is to replace “should” with “more realistic and less upsetting terms”<sup>26</sup> such as “It would be nice if” or “I wish I could”.

**All-or-nothing thinking** relates to the part of oneself that tends to judge one’s own behaviour, and to exaggerate flaws and limitations to the detriment of positive qualities. It also tends to compare the self with others, with the latter often more favourably presented. Examples from the narratives include: “It is hard not to wonder, *What will other people think?*” and “It was only the first step and the most difficult was to come: remaining on top.”

All-or-nothing thinking originates in the evaluation of one’s own performance exclusively on the outcome, regardless of the effort, which Burns calls ‘the achievement trap’, or the trap of feeling you must perform in an outstanding manner in order to feel worthwhile and happy. The potential consequences of all-or-nothing thinking are exhilaration when one reaches one’s goal, and extreme disappointment or frustration when one does not.

Burns proposes two approaches to challenge all-or-nothing statements. The first approach involves challenging ‘automatic thoughts’ that relate to a potential failure, in order to unveil the root of the all-or-nothing statement. To take one narrative as an example: “the most difficult was to come: remaining on top”. This can be challenged by asking: What would happen if I did not remain on top? Why would that be a problem? What would be upsetting to me? The second approach involves developing a process that recognizes that some factors that will ultimately influence one’s level of performance are beyond one’s control, although one always remains in control of the skill, effort and the process one follows. Stated differently, this is “refusing to try to do an excellent job” on each and every project or task; rather, it is “aiming for a good, consistent effort”<sup>27</sup> across all projects.

**Jumping to conclusions** is defined as making a negative interpretation even though there are no definite facts that convincingly support one's conclusions. Examples include "I am very disappointed that I wasn't able to anticipate the importance of building a strong friendly relationship with X, who discounted my position and value-add just because he didn't know me enough" and "A 15-person meeting, a tense atmosphere, and a total lack of dialogue/exchange, a CEO who asks questions without really expecting answers because he already made up his mind: our budget is definitely not pleasing him."

These statements reveal a perceived underlying 'unfairness or injustice', which may lead to anger and resentment against the other person. However, this is not necessarily grounded in fact but may be a projection of one's own vision of reality. A proposed method to challenge such statements involves: (1) *Empathy* through asking the person exactly what he/she means, without being judgmental or defensive, and try to obtain specific facts. (2) *Disarming the critic* to find some way to agree with them, even if it is perceived as false or unwarranted, and (3) *Feedback and negotiation*, in which one's point of view can be expressed assertively but tactfully, acknowledging that one might be wrong. This involves give-and-take and may result in both parties seeing reality slightly differently, with nobody losing face.<sup>28</sup>

**Over-generalization** is to perceive a single negative event as a never-ending pattern of defeat, or the assumption that because one has gone through a bad experience in a particular situation, that experience will repeat itself in the future. In the narratives, over-generalization statements were not directed at self but at other people or a system: "There is no fairness in the company and most people follow their gut feeling..." and "If an MD denies to another team the access to one of his/her clients [...], senior management does not say anything."

Reframing over-generalizing statements involves rephrasing in a more fact-based and less generic way, looking for examples of counter-balancing evidence. The following questions can be useful in achieving this: What is the evidence for this? Has this always been true in the past? Were there times when this was not true?

## Practical Implications

The categorization of negative and positive self-talk can serve as an effective self-help or coaching tool to help leaders understand their patterns of thinking as either constructive or self-defeating. In doing so, they may reframe negative self-talk in a more positive way, as well as actively engage in positive self-talk in order to drive motivation towards performance and accomplishment of goals. The first step is awareness and reflection on one's inner dialogue and using the categorization as a guide to better understand one's pattern of thinking. One can then follow Burns' recommendations, described in the preceding section, to counteract the effects of negative self-talk.

As an internal coach, I worked with women leader within my organisation to self-correct self-talk in individual sessions. These were colleagues outside of my line of management, which I felt was an important boundary in an internal coaching situation. The interventions consisted of three one-hour coaching sessions, one month apart. Session one was used to share the broad lines of my research, understand the coachee's objectives and how I could help her. The coachee was then asked to respond in writing to five questions aimed at eliciting narratives on some episodes taken from their professional life, and to send the response to me before the second session. During this second session, I walked the coachee through the self-talk patterns present in her narrative - which were all found within the lists discussed above - and explained for each of them the psychological dynamics at play and how this affected her behaviour. I also explained the tools to reframe her negative self-talk and how she could apply them. At the end of this session, the coachee would agree on a number of strategies that she would implement, to be debriefed one month after in a final session.

Overall feedback from coachees was very positive, as they became visibly more reflective and gained awareness of their own self-talk. However, they all mentioned that they would sometimes catch themselves engaging in negative self-talk, especially in stressful situations. As a process, I found this short but efficient individual intervention yielded some key actionable items and visible outcomes.

In terms of leadership development, the next step would consist of designing a training session where anonymous extracts from participants' narratives would be shared to walk the group through the various types of self-talk, coupled with individual feedback on self-talk and the definition of an action

plan (which could possibly be subsequently shared in pairs or smaller groups). This could potentially broaden the impact of intervention.

My goal for the study was to create a useful tool for women executives, so that they could understand better the underlying nature of their inner dialogue. It may also be of interest to line managers and coaches, shedding light on an area of personal development - self-talk related to the fulfilment of one's professional potential - that is largely missing from existing training materials in banks. Additionally, the study provides a tentative, practical approach to self-leadership, combining diverse theories (cognitive distortions, self-leadership, emotional intelligence). Addressing both sides of self-talk makes the analysis more balanced, and perhaps even more palatable to senior executives, whose negative self-talk tends to be less frequent and therefore may underestimate the influence of positive self-talk on the performance of their teams.

## About the Author

Nathalie Depauw is an international finance executive with more than 15 years' experience in banking in Europe, the USA and Asia. She held various leadership roles in these geographies. She graduated from the Executive Master in Coaching and Consulting for Change in INSEAD Singapore in September 2014. On top of her current position based out of Hong Kong, she is actively involved in internal coaching and mentoring.

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# Daughters as Successors to Indian Family Business

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Sudha Anand

## The Starting Point

My interest in this topic was driven by my own career transition. After working for a large multinational company for over 20 years, I started work with a family-owned business in India. It was during this time that I became curious about the identity challenges daughters in family-owned businesses faced if they wanted to join their father's business, and how they dealt with and prepared for it. Unlike a professional setting, the family setting is far more emotionally demanding because key relationships with parents, especially the father, are at stake. Hearing the stories of Indian daughters in line to succeed has made me more aware of the stages of my own transition and the importance of identity and transition in the roles we play.

## Idea In Brief

Family-owned businesses (FOBs) account for 85% of all private companies throughout India and play a vital role in contributing to the economy. Managing succession is one of the biggest problems. With the advent of economic and technological growth, women are stepping out of traditional roles and breaking into traditionally male-dominated areas, such as business. In doing so, they are abandoning age-old cultural role models to create new identities of their own.

In-depth interviews were conducted with six women to better understand the transition phase of women successors to FOBs in India and the role of culture and society in the identity work they undertake. The results indicate that:

- The dominant identity theme for Indian daughters who aspire to succeed to a FOB is their choice to define a new meaning and identity for themselves without completely upsetting the old social order.

- Fathers still play an influential role in their career path in the family-owned business. Having a progressive and liberal father is a precondition to any transition.
- Early marriage may be critical for choosing not to pursue a professional career. As a general rule, women who marry young usually conform to social expectations to take care of the home, and choose to not follow a career. Married women often face enormous pressures to put their family's needs before their professional aspirations. However, there are exceptions.

### **Idea in Practice**

Indian daughters can now claim their rightful share of the family's assets and participate in the family business. Understanding and being aware of this change in identity and the transitions women undergo will help business owners and families carefully prepare for new leadership in their firm. The way forward for daughters who aspire to become CEOs is to start adopting more relevant role models to achieve their "imagined selves" rather than try to integrate traditional role models with modern ones. Mothers can play a more dominant role with the telling of "modern stories" of strong, empowered and independent female role models at an early age. Young women should also discuss with their father at an early stage about their place in the business so that they don't face disappointment in the end, especially where male heirs are involved.



## Introduction

Two out of every three listed companies in India are family-controlled, making the country home to the largest block of family businesses within Asia. A 2011 study conducted by global financial services firm Credit Suisse found that 67% of all listed companies in India were family-controlled entities, and they generated over 70% of market capitalization, 75% of GDP, and 57% of employment in the country.<sup>1</sup>

With the advent of economic and technological growth, patriarchal Indian society is going through major changes. Over the last three decades, women in particular are stepping out of traditional roles and breaking into traditionally male-dominated areas such as business. Some women give up successful personal careers to play substantial roles in their family firm. This is a big change from the past where daughters could claim their rightful share of family assets but stayed away from actually participating in these businesses. Now, they are rejecting age-old cultural role models.

However, there remains sparse research on gender issues in family firm ownership and management,<sup>2</sup> especially in developing countries like India. The focus of existing research has centred on succession planning and professionalization of management. Very little has been written on the identity transition of women in modern India, especially the experience of daughters in line for succession. Is she ready or does she wish to take on a leadership role in the family firm? What are her challenges and how does she evolve through them? Does she forge a new identity or does she give in to social pressures?

### **New role models for new aspirations**

Although there is a rich heritage of female role models in Indian culture, these generally consider women to be the weaker sex, allocating them a marginal role in decisions in domains (e.g. work, society) beyond the family. In parallel, women have been worshipped as goddesses or earth mothers since time immemorial, embodying the virtues of strength, devotion, understanding, knowledge, wealth and purity. Their symbolic existence as *Ardha Nareeshwar* or *Ardhangini*, meaning “the Lord who is half woman”, represents the synthesis of masculine and feminine energies of the universe and proves her status as an equal partner. This ideology has percolated down the ages to the extent that women in Indian culture have maintained a dignified status in society.

While the scriptures give the woman a legitimate space and due respect, socio-cultural structures, glorified in the deities *Sita*, *Savitri* and *Kannagi*, depict them as devoted to husband and/or father; women are supposed to live for the men in their lives, denying what they feel is right for themselves, for others, or the system in which they live. In everyday life, Indian women rarely step out of the boundaries imposed on them, and may even be penalized socially for displaying strength or independence. Hence they rarely express those aspects of their identity.

The adoption of Western models and behaviour patterns in the Eastern environment, and the transition from the agrarian to the industrial/technological era have had a significant impact on the identity of women in India. Women are now crafting new identities as they seek to find a balance between traditional roles and modern aspirations. At the cognitive level, Indian women want to gain freedom from rigid social and family expectations, but at the emotional level, they remain deeply anchored to tradition. Caught between their aspirations for a new worldview and the persistence of centuries-old traditions, Indian women struggle to win equality, respect and autonomy.<sup>3</sup> To resolve these tensions, three types of responses emerge:

1. **The Adjuster** accepts the traditional roles and lives by them. She is content in her prescribed role and experiences little conflict—internal or external. The family is her focus.
2. **Asserters** are pushed and pulled by both systems. They are aware of their potential and react aggressively to the restrictive role imposed on them. They constantly find themselves in conflicting situations as they strive to assert themselves.
3. **Drifters** have chosen to define new meaning for themselves without upsetting the old social order. In doing so, they attempt to redefine their roles, the system and the nature of relationships.

## METHOD

The objective of the study was to understand the transition phase of women successors to family-owned businesses in India, and the role of culture and society in the identity work they undertake. Interviews were conducted with six women. Four of them were board members and executive directors in line for possible succession. Two of the women had chosen not to pursue careers in the family business—their own or their husband's—but to become entrepreneurs or social workers. Additional data on a well-known and successful female CEO was included. Major and recurring themes from interviews were identified and analysed.

## Key Findings and Discussion

Although traditional social and cultural norms are becoming less influential as more Indian women adopt working identities, the father remains influential within family-owned businesses. In response, women use a number of adaptive strategies to reconcile their filial duty with their personal ambitions.

### **Cultural and social norms are less influential, as are traditional models of women from mythology, history and religion**

None of the women interviewed felt constrained by the expectations and social identity norms of their respective communities. Moreover, the role models described in traditional lore are of decreasing influence and relevance. Cultural role models like *Sita* and *Meera* have been replaced by the empowered form of Shakti in the form of *Durga* or *Kali*, role models who embody strength, independence and grace. The proliferation of the nuclear family with less day-to-day involvement of the extended family has also influenced this trend. Parents are now willing to let daughters explore their own interests.

This point emerged very clearly in Amrita's story. Amrita is Director of Operations at a medium-sized electronics company. She worked for a leading private equity firm in India before joining one of the group of companies established by her father. Her elder brother has established his own fund and is not involved in the family business. As such, Amrita is likely to become the CEO.

Amrita started in the family business with no product knowledge. Her father took the approach: "You come and learn and then we will see if you fit."

Culturally, Amrita belongs to a small business community known for its trading and business acumen. The community is conservative; although women are educated and many pursue professional careers for a short while, they marry relatively young and are expected to comply with the rules and values of the family they marry into. However, Amrita has had minimal social contact within her community, does not identify with it, nor subscribes to traditional role models for women.

Amrita is still experimenting with possible selves. She is determined to make a success of the business and earn her father's and brother's respect, but is ambivalent about what she would like to do in the future and what may happen if she marries. Thus she remains in the neutral zone, beginning to internalize the changes of working for her father and learning the business but not yet fully assuming that role. Amrita fluctuates between the archetypes of Asserter and Drifter. As an Asserter she creates conflicting situations to assert herself to change the boundaries her father has set in running the business. As a Drifter she has chosen to work for her father rather than independently at a financial institution to define new meaning for herself.

### **The father figure plays an influential role in the daughter's career path in family-owned businesses**

Fathers (as founder/owners of the business) and male family members (brothers or husbands) continue to play a defining role in shaping the identities of daughters who aspire to be CEOs. A progressive and liberal father is a precondition to any transition journey of a daughter wanting to move out of a traditional role. For most of the interviewees, the father (and founder) remains the final decision maker. The daughter accepts that although she will get an equal share in the distribution of assets, she may not be made successor when there are male siblings involved. As she does not want to cause conflict in the family, she takes a secondary or complementary role.

The key role of the father was an underlying theme in all the interviews but stood out very clearly in the case of Kareena. Kareena is Director of Marketing of a medium-sized company in the textile industry. Four years ago, she joined her father in the family business and currently manages five business divisions of the company. Although Kareena is the oldest child and the first to enter the business, it is not clear whether she will be the chosen successor. Her brother is pursuing an MBA overseas but is unsure of joining the family business. Kareena notes, "It is a sore point with my father, but he has given him (brother) the liberty to decide. I will be very happy to have my

brother working in the business, but he is 11 years younger than me and I know a lot more than him.”

While she considers herself the “son”, the thought has crossed her mind that her father may not choose her as his successor. “My father has run this business for 30 years and I don’t want to take away his rightful place in the business. I know I want to be CEO and successor to his business, but I have to abide by his decision.” She wants her father to understand her dedication to the business– she will not “marry a man who will not allow me the freedom to pursue my work in my family business.”

Kareena is struggling between her identity as a capable successor to the business and the rule that she must comply with her father’s wishes. She is in the neutral zone, wrestling with the dual identity of daughter and business partner. Kareena’s identity is both of an Adjuster, who accepts the traditional role and does not want to create conflict, and a Drifter trying to create a new space for herself. She is attempting to redefine her role, the system, the nature of her relationship with her father, and her place in the business.

### **Early marriage may be a critical factor for pursuing a professional career**

As a general rule, daughters who marry early usually choose to give in to social expectations to focus on the home. This was clearly the case with Aradhana, age 55.

Aradhana belongs to the Marwari community and is an entrepreneur. Her father was one of the most successful stockbrokers of his time and the business was inherited by her brother. Aradhana has three sisters who are all housewives and homemakers.

Aradhana was married into another business family at the age of 22, immediately after her undergraduate program. None of her sisters studied beyond high school. Aradhana was an outstanding student but accepted the fact that once married she would not be allowed to work. When asked why she did not join her father’s business, she said, “When there is a male heir, daughters are made to sign a declaration confirming that they will not ask for ownership or management stakes in the family business. When I got married I signed a similar declaration.”

Aradhana accepted the constraints and boundaries laid down by her father and the community she was born into. She played the role of wife, daughter, daughter-in-law and mother as dictated by tradition, but continued to entertain

the idea of becoming an entrepreneur. After 15 years at home with three children, Aradhana finally set up her own boutique, designing and selling clothes and bridal wear. She has found her niche.

Aradhana embodies different identities at different stages of her life. In her early 20s, her dominant identity archetype was that of an *Adjuster*, family was her main focus. The death of her parents-in-law was a critical event in her identity transition. She became a *Drifter* as she established a new role for herself. She worked hard to set up her business and in doing so redefined her role and her relationship with the system. With every step she took she established her independence.

### **Drifter is the dominant identity for daughters with aspirations for succession**

No one who aspires to be a successor or CEO is an *Adjuster*. Some start out as *Adjusters*, but as they progress in their identity transition they move towards being *Drifters*. Women imagine different roles for themselves but they prefer to do this without creating conflict as much as possible—they don't choose to be *Asserters*.

Devyani is CEO of a technology company, a subsidiary of a holding company set up by her father. Her interest in business started at a very young age. She recalls being taught the principles of business by her grandfather when she was seven. She was encouraged by her father to visit his office regularly from when she was 11. At 16 she started work, and at 24 became a director in her father's company. At 26, she incorporated a new company and became its CEO. Devyani has a brother who is the CEO of another subsidiary.

On the question of succession, she says, "My older brother is the financial head of the business, and I will be in charge of brands. But we both have our own businesses to run independently, while my father is the active chairman. Our roles match our personalities." Breaking with tradition, she says, "I am not going to get married into a typical Marwari family. I will always be with my business and will never give it up for my in-laws' business."

Devyani sees herself as an "iconoclast", someone who questions established ideas: "Why shouldn't Marwari women work? Why shouldn't every youth aim to be a leader?" she asks energetically. Devyani is a *Drifter*. Although her parents were liberal and progressive, the cultural and community boundaries were restrictive, so she had to fight to create a new space for herself in the community. In doing so, she redefined her and other women's roles, the

system, and the nature of their relationship. She has expressed a desire to be Prime Minister of India in public interviews, and in doing so has encouraged other women in the Marwari community to aspire to greater heights.

## **Practical Implications**

The testimonials from the study suggest a number of practical steps for Indian daughters who aspire to become senior executives. First, they can adopt more relevant role models early on, rather than try to integrate traditional role models with modern ones. While the mothers of the sample group (with one exception) played a peripheral role in their daughters' leadership identities, the new generation of women who succeed in becoming senior executives may in turn provide new and more influential role models and narratives to their own children.

Young business-minded women should also talk to their fathers about their place in the business at an early stage in their career, so they don't face disappointment in the end, especially where male heirs are involved. When expected to defer to a male heir, their strategy can include imagining other leadership identities outside the family business, allowing them to pursue equally ambitious professional and leadership goals.

Finally, in the context of family-owned businesses where daughters have to manage both succession aspirations and family relationships, they often adopt a *Drifter* identity, whereby they redefine their own roles, the system, and the nature of their relationships with others. In deference to their families, they avoid assuming an assertive identity, which would create tension. Drifting is a more subtle art of crafting their identity. With every step, they create a new space without dismantling the existing social order, although in so doing, they are in fact influencing that order.

## About the Author

Sudha Anand is a finance professional, having worked in the global markets division of an investment banking group of a large global bank in India and various other locations in Asia over 25 years. She qualified as a chartered accountant in India and a CPA in the US.

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<sup>2</sup> Sonfield, C.M. and Lussier, N.R. (2003). "Family Firm Ownership and Management: A Gender Comparison". Paper presented at the National Conference of Small Business Institute Directors Association. University of Central Arkansas, Hofstra University, Springfield College.

<sup>3</sup> Parikh, I. J. and Garg, P. K. (1989). *Indian Women: An Inner Dialogue*. Sage Publications.



## Commentary on Part Three

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Once the individual overcomes the doubts, anxieties and fears of entering into a transitional space, he or she can begin the experimental phase of identity work. It is a creative space characterized by continued struggles and rich with interior dialogues and sense-making. This is the stage where the individual begins the hard work of constructing the pathway between past, current and future identities, while facing both external and internal obstacles.

As Depauw's study shows, a person's inner dialogue can be used to both positive or negative effect. A positive frame of mind can drive desired behaviour, just as negative thought patterns slow down progress or even create barriers. Anand's conversations with Indian women with ambitions to succeed to family businesses reveal the delicate balancing act of forging a new identity without severing ties to the past. Her work also shows that there is no single pathway, but that each path is shaped by both one's internal desires and one's response to social and life influences.

### **What lessons can be drawn?**

As their respective work illustrates, the key to achieving desired goals is self-leadership and self-direction in the form of awareness of one's own thinking and motivations, as well as the broader forces at play, be they social, organisational or family factors.

- Depauw argues for managing one's inner thoughts. She has found through her own coaching practice that self-leadership can be developed, and that negative patterns of thinking can be corrected and directed towards more positive ones so that individuals take greater responsibility for their choices and behaviours.
- For Anand, it is about being proactive, thinking and planning ahead, especially in family businesses where power and decision-making remain largely with the (typically male) owner/founder. Women with aspirations to succeed need to have conversations early in the process, to set expectations so that they can adjust their strategy

accordingly and maintain their professional and leadership goals whatever their external circumstances may be.

- Anand also shows how it is possible to redefine one's identity and role without dismantling the existing social order or the nature of one's relationships with others. This requires a strong conviction about one's position, as well as engaging others in the process.



PART FOUR

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# OUT OF THE LABYRINTH

The chapters in this section portray how groups of individuals - facing different identity issues - have come out of the labyrinth with a newfound sense of self, freedom and empowerment. All the stories share similar themes: the difficulty and often emotional and psychological turmoil of the transition process, but also the rewards - self-knowledge, empowered sense of self, renewed meaning - of having undergone the rites of passages.

Lucia Ballori's chapter on *social and emotional coping post-divorce* in Singapore provides another lens on the adaptive strategies used to craft a renewed identity. She explores divorce as an example of a disruptive and devastating transition that can lead to growth and renewal. Ballori found that the women in her study tried to fulfil expected gender roles within marriage to please their husbands. During the divorce process, many came to realise that this came at the expense of their own personal development. They described being trapped in the "ideal wife identity" and roles that their husbands had crafted for them, lacking support from their marriage to become empowered. In fact, it was only when they had ended an unfulfilling marriage that they could begin their journey of transformation and self-empowerment.

Hestie Reinecke's paper on *unchildlessness* also explores the adaptive work needed to create an alternative self, this time in the context of involuntary childlessness. She reflects on the ways in which people who are unable to have children seek to fulfil their need for generativity, one of the phases in the life journey, from which people derive solace as well as energy in helping others to develop and grow. Coping mechanisms and functional skills include employing creativity, experiencing gratitude, and being proactive. One coping skill that stood out in her study was increased self-awareness and emotional regulation.

Angela Matthes' chapter on *cross-gender transition* discusses how a personal transition can lead to systemic changes in the organisation. The author describes how the forging of a new identity had an impact 'above and below the surface' on the people in her professional environment. She also discusses how the use of 'fair process' can assist the organisation in the transition process.

Openly gay men and women are rare in the c-suite. They often stay in the proverbial closet, and they rarely reach the top, despite the fact that openly *LGBT leaders can bring unique and essential qualities* to the leadership task. Stevin Veenendaal's chapter explores how openly gay executives give meaning to their leadership roles, finding that a minority sexual identity does indeed significantly influence the way one leads, for the most part positively.

# Working Women in Singapore: Their Post-Divorce Lives

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Lucia Ballori

## The Starting Point

At the beginning of this research project I had a number of inhibitions, including doubts that any divorcees would come forward to tell their stories. It seemed too much to ask of someone to open her life and share private information with me—a person they hardly knew. And even if they did, the question remained: What value would they derive from this undertaking? However, during the interviews, the participants revealed that not only were they interested in the topic, but that being able to talk about their divorce experience also had a therapeutic effect.

## Idea In Brief

In Singapore, women's increasing participation in the workforce and growing autonomy, while juggling family demands within the context of a conservative society, have contributed to a rise in divorce. The potentially traumatic experience of divorce can disrupt a woman's personal identity - the shift from "coupleddness" to "uncoupleddness" – and have a devastating impact on her wellbeing. This study reports on the real-life perspectives of seven professional women in Singapore as they navigated through the emotional journey of rebuilding their post-divorce lives:

- *Phase 1—An Ending: Grieving and Role Transition.* The journey of recovery began with mourning the loss of the marriage. The women experienced powerful emotions as they lost the good parts of their marriage – including the positive aspects of their former spouses – as well as the socially acceptable image they had projected to the outside world as successful career women in a “fulfilled” marriage.
- *Phase 2—The Neutral Zone: Challenges of Coping and Supportive Structures.* Emerging from the “ending” of grieving, the interviewees confronted the challenges of rebuilding their post-divorce lives. In the process they encountered difficulties in both the personal and

professional spheres. Social structures, specifically family and religious entities, enabled some of them to cope with post-divorce life, but undermined the endeavours of others.

- *Phase 3—A New Beginning: Transformation through Empowerment.* In the final phase, the individuals became empowered with a newfound sense of hope and reconstructed self. To fully transition out of the crisis of divorce one has to accept their post-divorce life, take responsibility, and transform their identity.

### **Idea In Practice**

In cases where divorced women have to assume the dominant role as head of the household, the challenge also provides a sense of empowerment. *Taking responsibility* for the breakdown of marriage is a psychological milestone which allows a sense of closure. *Coping and support* are also critical to facilitate transitions. Social structures like family, religion and government policies were both supportive and oppressive. While some participants experienced support from the family, others spoke about the experience of stigmatization that resulted from divorce due to religious beliefs.

## Introduction

The dissolution of a marriage is a distressing event. For divorcees, the stress that stems from changes in their socio-economic circumstances often compounds the emotional upheaval they are experiencing.<sup>1</sup> Even though the termination of an unhappy marriage can produce a sense of relief, it also triggers feelings of fear, anxiety, loneliness and guilt, especially when children are involved.

As in other industrialized economies, Singapore's divorce rates have increased steadily over the past two decades: the number of divorces more than doubled from 3,364 in 1990 to 7,237 in 2012.<sup>2</sup>

Women in Singapore are encouraged to join the workforce, and they now constitute about 58% of the labour force. This massive increase in participation is the result of government policies to build a substantial workforce—considered to be a critical economic asset for a tiny city-state with scarce natural resources.<sup>3</sup> Despite their full-time jobs, married women and mothers are still expected to assume primary care-giving responsibilities for elderly parents and young children in Singapore's culturally conservative society. Societal pressures to combine the roles of working professional and wife/mother often compete with a desire to fulfil their own aspirations. Given the reduced stigmatization attached to divorce, more and more married women are opting for divorce when they feel that their needs are no longer being met within the marriage.<sup>4</sup> In Singapore in 2012, 64% of divorce cases were filed by women.<sup>5</sup>

The city-state of Singapore constitutes a compelling setting for a research on divorce because both the socio-cultural traditions of this multi-cultural society and the policies of its highly-interventionist government are heavily skewed in favour of marriage and family.<sup>6</sup> As a predominantly Chinese society, it is heavily influenced by Confucian ethics that promote traditional values such as hard work, self-discipline, and filial piety.<sup>7</sup> Embracing the various aspects of globalization in pursuit of economic development, Singapore society has evolved to become one that straddles both conservative ethnic traditions (Chinese, Malay, and Indian) and the more liberal Western culture.<sup>8</sup>

Moreover, to hold in check liberal tendencies that do not conform to traditional family norms, the government promotes communitarian ideologies that are pro-family, pro-marriage, and pro-creation.<sup>9</sup> Essentially, the conventional dual-parent family is considered the bastion of a successful “Asian” society, with

married women encouraged to bear more children. In such a context, divorcees and unwed mothers seem to strike a blow against the government's ideology.<sup>10</sup>

Despite the convergence of ethnic traditions and government policies to deter divorce and promote marriage, Singapore's divorce rate continues to rise. This phenomenon deserves further exploration as divorced women in Singapore are clearly defying considerable odds in pursuing this major life decision.

## **METHOD**

Seven divorced Singaporean women, between 33 to 60 years old, from diverse ethnicities, participated in the study. All were working full-time at the time of interview, with the exception of the 60-year-old who was in semi-retirement. The Life Story Interview (LSI) was used to gather rich descriptive accounts of the real-life experience of the participants in this study. William Bridges' three phases of the *Transition Model* was applied as a theoretical framework to depict the different stages of their emotional journeys.<sup>11</sup> The LSI took the form of semi-structured interviews using open-ended questions to allow free-flow narratives from the participants. Interviews were analysed in depth for recurring themes. I also used myself as a tool. Being a divorcee myself, their experiences resonated with mine. Having the same experience allowed for an increased level of understanding of the participants' perspectives, which added richness to this explorative study as well as my own personal experience.

## **Key Findings and Discussion**

### **Let go of guilt, appreciate the positive**

Even though the participants' journeys of recovery began with their mourning the loss of the marriage, they highlighted many positive moments, including the joy of having had children with former husbands who were responsible and loving fathers. As their ex-husbands were good fathers, it made the participants wish that things could have worked out in the marriage. The sense of grief was particularly acute for Sally,<sup>1</sup> who lamented the loss of a 20-

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<sup>1</sup> All names have been concealed to protect the anonymity of the individuals.



year marriage during which they built a beautiful family together: “We have four beautiful, intelligent and highly successful children. We both contributed to their proper upbringing. There was no way I could have done it all by myself.”

Little wonder that all participants experienced emotional turmoil in the wake of divorce. Mary was initially in denial: until that moment she had thought that they had a happy family and marriage, which had lasted for 18 years. When she got the news that her then-husband was having an affair and had resolved to leave her, she plunged into a state of shock that she considered the “saddest moment of [her] life”.

What further exacerbated their negative feelings during this initial period was their perception that they had somehow failed as individuals. Because they held on to an idealized notion about marriage (that is “perfect” when intact), it was devastating for their sense of self when their marriage ended.

### **Traditional families react differently**

After a while, each woman began to confront the challenges of rebuilding both the personal and professional spheres of their post-divorce lives. For four participants, their families of origin served as a primary and stable support network, particularly in providing them with practical support. Others spoke about the stigmatization that resulted from divorce. Three women came from conservative families who adhered to religious and cultural beliefs that marriage was supposed to last forever and that women should put the needs and interests of their families before their own. Julia said: “My parents knew what was going on in the marriage, but being very traditional parents, they could not quite understand why I would leave him, despite the fact that he was unfaithful and that he had wiped out our joint savings account. My mother could not understand why I could not just close one eye for the sake of my two kids. It’s her mentality: I was to blame for the breakup of the family—the fact that my children will grow up without their father.”

### **Making peace and moving forward**

At this point, taking responsibility for the marital problems was a critical milestone in the transition process. Through acknowledging their own shortcomings that contributed to the breakdown of the marriage, the women were able to attain a sense of closure following the divorce. It is evident that, at this point of their journey, they had achieved a strong sense of “emotional self-awareness,” defined as “the ability to recognize your feelings, differentiate

between them, know why you are feeling these feelings, and recognize the impact of your feelings.”<sup>12</sup>

Julia provided a clear description of such self-awareness: “I stopped blaming him for all that had happened and took responsibility for some of his behaviour. He was a horrible husband to me for many years because I chose to turn a blind eye and allowed him to behave the way he did.” Similarly, Alicia and Carol looked back upon their past behaviour when they were married, and recognized that they had alienated themselves from their husbands. In taking ownership of their past mistakes with increased self-awareness, they were able to make peace with their post-divorce life.

### **A renewed professional energy**

For most of the women, transitioning from marriage to divorce had been fraught with a host of struggles, including single parenting. As sole breadwinners in their households, the women worked hard at their jobs, becoming better employees and achieving greater success in the process, as they strove to provide financial security for their family. For instance, Doreen displayed significant professional development as she moved from a series of temporary jobs after her divorce to a managerial position at a publishing company.

In their narratives the women spoke of how the fulfilment of expected gender roles within the marriage – to please their husbands and others – had often come at the expense of their own individuality and needs. They described how they were trapped in the “ideal wife” role that their husbands had crafted for them and expected them to portray. For example, Carol changed the way she dressed to cater to her husband’s preferences. Sally relinquished her career and her working identity for the sake of the marriage and the family. Rachel’s violent ex-husband would tell her: “I won’t beat you if you behave the way I want you to behave.”

The final psychological milestone was inextricably marked by the dramatic identity transition from a secondary role as wives/mothers within a marriage to being the sole (and thus dominant) head of the household. For all seven women, the losses that they had experienced were more than offset by what they had gained. In the post-divorce process of putting their lives back together, they re-discovered themselves, transformed their identities as part of a reconstructed self, and re-defined their social circles and relationships.

## Practical Implications

Particularly in more traditional societies, families and social structures can serve as both coping and stigmatizing mechanisms. Family support can alleviate some of the distress and stress of post-divorce lives when women become the breadwinners of the household and face the challenges of single parenting. Focusing on children is one of the key adaptive coping mechanisms that drove the women to move on from their marital loss and transform themselves into empowered individuals.

The interview process also served as a powerful means for the women to talk about and make sense of their experiences. The interviews led them on a journey back in time to look back on past experiences, and this new vantage point enabled them to see things that they had never seen before. Storytelling can serve as a powerful therapeutic tool: to affirm that they were not alone in the struggle, provide a sense of relief as well as moments of discovery.

## About the Author

An experienced executive in faculty management, Lucia has been in tertiary education management for 15 years. She is currently Global Director of Faculty Administration and Support at INSEAD, serving more than 150 permanent world-class faculty of 35 nationalities across three campuses. She has a passionate interest in women's issues in the domestic sphere, having struggled with a failing relationship that resulted in divorce after 23 years of marriage. Lucia is co-founder and CEO of WOMANITY, a community-building platform where women, through shared experiences, can uncover their untapped potential. She is also the founder of Life Architect for Women, an organisation providing life skills coaching for women.

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# Unchildlessness: The Transition from Childlessness

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Hestie Reinecke

## The Starting Point

For people who are experiencing the need, the transition to a more fulfilled identity is possible, and this transition follows a process that can be navigated. The aspiration of this study was to apply this simple notion to the mire of childlessness, as there is still little frank guidance available for people affected.

## Idea In Brief

Parenthood is seen by most people as central to a meaningful and fulfilled life. As such, involuntary childlessness can seem a threat to one's sense of self, as well as to the core values and meanings attached to life. However, little is known about how subsequent chapters of life without children can evolve for the better. To explore the possibility of successful transition, six people (four women and two men), including two couples, shared their stories on how they have lived through the childlessness experience. The main findings are as follows:

- The transition process includes in its early stages a process of “leaving behind” that is difficult and intense, involving shame, guilt, dealing with grief and loss, and a search for acceptance.
- The transition process is supported by developing coping strategies such as self-awareness, self-regulation, self-identity and making sense of things, which are all precursors to moving on. It was only when people moved into a more reflective space - of self-understanding and sense making - that they were able to actively seek alternative identities and make progress with the transition.
- A strong support system is critical for successfully managing the transition process. The most critical support appears to be found in the strength of the relationship between the partners.

- The transition ultimately reaches a stage where alternative identities have to be created to fulfil the need for generativity. This can take the form of becoming a parent to “brain children”, and by channelling creativity and life goals into other avenues.

### **Idea In Practice**

The study explores the transition from childlessness to acceptance of unchildlessness. The initial stage is characterised by the search for acceptance. The middle stage involves a number of supporting and inhibiting factors which either drive the individual forward or push them back. In the final stage, peace and contentment are attained, where the primal need for generativity is fulfilled. Developing resilience is among the key factors that enable a successful transition. Transference also plays a beneficial role in the experimentation of possible identities for fulfilling generativity—in the form of alternative caring relationships, surrogate families, and developing and expressing one’s creativity.

## Introduction

Parenthood is seen by most people as central to a meaningful and fulfilling life. This study focuses on those individuals who want to be parents but are unable to fulfil this desire—referred to as “definitive involuntary childlessness”. This includes people who are biologically unable to have children and for some reason cannot adopt. Moving involuntarily to a permanent state of childlessness may present a significant threat to one’s core sense of self, as well as to the central values and meanings attached to life.<sup>1</sup> Indeed childlessness has been seen throughout history as a great personal tragedy, with a profound impact on one’s emotional wellbeing, partner relationship stability, relationships with extended family, social standing and religious faith.<sup>2</sup>

One of the key challenges faced by those experiencing involuntary childlessness is the struggle to create a new identity or find meaningful alternatives. Having experienced an “identity shock”, the process of incorporating the reality of childlessness into their identity is often slow and painstaking.<sup>3</sup> Some involuntarily childless individuals continue to feel desperate and unfulfilled; others move on with a positive perspective.<sup>4</sup> In the latter case it seems that shaping a new identity played a role. However, the literature on involuntarily childless individuals is still surprisingly sparse,<sup>5</sup> notably in the areas of coping with the permanency of childlessness<sup>6</sup> and a collective narrative of the “non-mother”.<sup>7</sup>

This chapter explores the idea that a greater understanding of the transition process from childlessness to acceptance – referred to as unchildlessness – could assist people in their ability to make sense of childlessness, reconstruct their lives, explore new selves, and find renewed self-worth and purpose.

### **Transition starts with the process of leaving something behind**

Childlessness and the inability to become a parent is an experience of profound loss and suffering. Some argue that traditional models of loss and grief, for example those by Kübler-Ross,<sup>8</sup> do not adequately portray the complexities of accepting and adapting to permanent childlessness. In some cases, ambitions of becoming a parent may intermingle with unattained or blocked life goals. When these goals are highly valued both personally and culturally,<sup>9</sup> they are difficult to let go. The period is often described as difficult and intense, in some cases involving shame and guilt in addition grief and loss.

### **Factors supporting the process of successfully moving on**

Self-acceptance (or self-reacceptance) is a prerequisite to beginning the process of constructing a future.<sup>10</sup> Individuals with active coping strategies (including seeking a new or alternative meaning of life) and strong social support experience less distress.<sup>11</sup> It is also important to take control of one's destiny—making active choices about the course of one's life.<sup>12</sup> There is additional evidence that partnership status has a much stronger bearing on psychological wellbeing than parental status.<sup>13</sup>

### **Barriers to successful transitions**

Childless couples are frustrated by the lack of information and role models to demonstrate how to live a satisfying and fulfilled life without children.<sup>14</sup> They may question the purpose of marriage and the meaning of family. Being faced with permanent childlessness may be a critical juncture in a couple's relationship. Culture and family views on the role of parenthood also play a significant role in the journey. In certain cultures, infertility carries a social stigma and the childless may even be cast out.<sup>15</sup> Parenthood provides structures, integrates people into social networks, and often provides meaning and purpose. For childless couples these are social circles and experiences that they will never tap into.<sup>16</sup>

#### **METHOD**

Interviews were conducted with six people - four women and two men - and included two couples. They all wanted but did not have children, and were willing to talk about their experiences. The participants were well-educated, upper middle-class individuals, in heterosexual relationships, and all still with their partners. During the open-ended interviews, participants were asked to recount their transition experience. Other themes elicited through the narratives were family role description and level of resilience in order to determine their effect on the transition process. The resilience in couples or individuals was also assessed through an instrument on coping and resilience to stress.



## **Key Findings and Discussion**

Generativity is defined as the psychological need to care for and give back to the next generation. Generativity is the seventh stage of Erikson's theory of psycho-social development in which adults (aged 40-65) strive to create or nurture things that will outlast them, often by having children.<sup>17</sup> As this avenue is not available to childless individuals or couples, alternative identities have to be created to fulfil the need for generativity.

### **Finding acceptance and dealing with grief and loss**

The conviction that one has considered or 'tried everything' to have a child – including other parenting options such as adoption – is a critical first milestone towards reaching acceptance. When compromise is needed between partners in reaching agreement that all feasible options have been tried, it must be attained without bitterness or blame, or the likelihood of their acceptance of childlessness will be reduced.

Another key theme is the intensity of loss and grief—a lonely process even when in a meaningful relationship with a partner. Coming to the point of realization of permanent childlessness involves a series of losses, with each miscarriage suffered or medical intervention failed. These losses are experienced as a death, and are comparable to losing a child.

However, unlike the death of a loved one, an experience usually shared with others, grief related to infertility or a miscarriage is not typically a public affair.<sup>18</sup> As such, traditional models of loss and grief do not adequately portray the complexities of accepting and adapting to permanent childlessness. Grief as it relates to childlessness seems to be poorly understood and hard to address—the interviewees had felt lost, with almost no support and no one to turn to.

### **Coping strategies in the form of self-awareness, self-regulation, self-identity and sense-making**

In a few cases the interviewees admitted that they had avoided confronting the issue by burying themselves in work and busyness. Others had periods where they succumbed to impulsive behaviour. Still others described that they 'got stuck' and struggled to get unstuck by taking action. It was only when people deliberately moved into a more reflective space of self-understanding and making sense of things that they found the ability to move on.

### **The power of support networks**

The importance of a strong support system was emphasized by all the interviewees. Existing networks of friends and family, however, played a lesser role. As one participant noted: “My family is not my support network. My parents don’t really know what to do with me; they don’t know how to talk to me. And I also want to protect them against the pain... I can’t talk to them about this...”

The most critical support appears to be derived from the strength of the relationship between partners. Although childlessness can lead to relationship discord, a strong partnership can help couples navigate the challenges.

### **Resilience as a buffer against the stress of childlessness**

A number of protective factors can buffer an individual and couple against the stress of childlessness.<sup>19</sup> Resilience – the ability to manage and cope with stress – involves the ability to modify previous views effectively and reach acceptance. Other coping strategies referenced by participants during our conversations included positive reinterpretation, emotional processing, emotional regulation and expression, social support and communication, which are all essential to decreasing depressive symptoms and stress. Open emotional sharing and communication was an especially crucial component to help counteract the feelings of loneliness, desertion and isolation.

### **The ultimate stage of the transition**

The desire for generativity may be channelled into alternative means of expression; it seems to play a role specifically in the creation of an alternative self that is a parent to one or more “brain children”. As one interviewee noted: “You look for an alternative. I did that via the young people that came through my office to whom I could be sort of a mentor rather than a parent. That helped me tremendously in having normal, good and healthy relationships with young people and allowed me to express the natural, instinctive desire that every parent has to be a leader and guide to his child.”

Another invested the energy in a business, developing the younger generation who acted as surrogates: “We established a new business and we were able to offer young people an opportunity to hone their skills and to get a leg up on their career path. We gave them the platform on which to build their fledgling career. They are all succeeding beyond our wildest expectations. The bonus that comes out of it is that there is a relationship forming between us and

them and their wives and their children, that is to us like having surrogate children of our own; relationships that will hopefully last until we are old.”

As these examples illustrate, parenthood is only one way to experience growth, maturity and wellbeing in adulthood. Despite the experiences of loss, grief and distress, the participants told of the ability to live through adversity, redirecting creativity and life goals, and finding alternatives, positive outcomes and fulfilment.

## **Practical Implications**

The study shows that childlessness can lead to the development of new alternative identities that can fulfil both the need for generativity and the ability to have a fulfilled life. A strong level of resilience is important for successful transitions. Future work could look at the development of a resilience model for the childless, while drawing on the frameworks of family stress and family resilience, designed to help clinicians and coaches explore resilience and encourage coping strategies among childless individuals and couples.

Transference can play a beneficial role in the experimentation with possible identities for fulfilling generativity, in the form of alternative caring relationships, surrogate families, developing and expressing the creative aspects of oneself, and investing in a business or career. Lastly, but significantly, the desire to be a parent need not be suppressed, but can live as part of the self and find expression in other ways.

## **About the Author**

Hestie Reinecke has lived in South Africa and the United Kingdom, working as a banking professional in the field of governance, control and risk management. She has over time developed a keen interest in people management and development. Hestie holds a Ph.D. in Mathematical Statistics and an Executive Masters in Coaching and Consulting for Change from INSEAD.

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# Fair Process and Transgender Transition in the Workplace

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Angela Matthes

## Starting Point

When Bruce Jenner, American Olympic gold medallist, transitioned to Caitlyn in full view of the international media, it seemed that transgender had become mainstream. But Cate's story is nothing like the experience the average transgender person goes through. Reality still has to catch up with reality TV. There are a lot of stories about transgender people who have 'come out' and have lost their jobs, families and friends. Should that make someone who felt it was time to transition anxious? What if you love your job, your family, your friends? How can you create an environment that will allow you to change gender and preserve the things that are dear to you at same time? This chapter explores the process of preparing an organisation for a gender transition. I draw on my own experience of transitioning while serving as a senior executive.

## Idea In Brief

Although there is greater acceptance of diversity in sexual orientation now compared to 30 years ago, questioning one's assigned gender remains deeply unsettling, to the individual and those around him or her. And if an individual's gender transition appears to the outside world to appear out of nowhere, without preparation, reactions may be unpleasant, even harsh. Through 150 conversations with colleagues and stakeholders in my work environment over a period of two and a half months, as well as surveys and interviews with others who have experienced transgender transitions, I discovered:

- *Coming out transitions create a disorienting dilemma.* In every interview it was confirmed that there was an initial disorientation among colleagues, which was rarely openly addressed. Their confused feelings were counterbalanced in some instances by respect for the courage to make the transition.

- *Engagement is important.* Confronted with an unfamiliar situation, people feel helpless. Through one-to-one conversations, I was able to take their questions and suggestions seriously, build mutual trust with my peers and create engagement from them.
- *Explanation creates understanding, which in turn creates support.* Although people are familiar with the term “transgender”, in most cases, a coming out represents their first real personal contact with a transgender person. As such, careful and considered explanations are needed to help them understand that the transition process is not an impulsive act but a well thought-out process of identity construction.

### **Idea In Practice**

When a personal change situation becomes visible in a work context - such as a colleague who goes through gender transition - fair process can help mitigate the disorientation that many observers feel. Within an organisational context, fair process can help people accept the outcome and support the individual in their professional role, even though they might not like or feel uncomfortable with it. It *engages* and involves them in the planning of the transition through mutual communication. Next, it serves to *explain* the carefully thought out reasons behind the decision, and reassure family, friends, colleagues and superiors at work. Lastly, it allows *expectation clarity*, whereby the transitioning individual makes clear his or her intention to transition, and stays in control of the process without preventing others from voicing their questions, ideas and wishes.

## Introduction

While there is some literature on the topic of transgender identity and a few guides for gender transitions that are visible in the workplace, the focus of these resources is almost always on the person transitioning, how those around them can support them, or the benefit for the company.

When someone in your organisation is going through a profound personal change like a transgender transition from male to female, you should not underestimate the stress this also creates for the individual or the people around him or her. In Switzerland, a country known for very low unemployment (3% to 4%), the unemployment rate for transgender people is approximately six times higher. Most lose their job either at the moment of their coming out or during their transition.

When a transgender person reaches clarity and finds the courage to come out and transition into her felt self at mid-career, she has already come a long way. (Although I use the pronoun “she”, what I describe here is true for the opposite gender.) She has had months – sometimes a lifetime – to prepare, and knows what she needs to do and what kind of help she needs.

However, for those who have known her for many years, learning about her transgender identity is an abrupt event. Psychologically, things happen above and below the surface in the minds of the people in her personal and professional environment. Confronted with what appears to be a sudden transformation, the result is often a dilemma that can range from disorienting to epochal. A *disorienting* dilemma may arise in less dramatic instances, from an eye-opening discussion to experiences that contradict accepted presuppositions. An *epochal* dilemma is an externally imposed event, such as death, failing an important examination, or retirement.<sup>1</sup> Either sort of dilemma may point to, or be a catalyst for, transition.

I am transgender. I am also the CEO of a company in Europe. During my own coming out in Summer 2014 I had many conversations that proved that my transition created a disorienting dilemma in the work environment but also presented opportunities.

To help the work environment cope with impact of a personal change, this chapter explores the concept of fair process to help create an environment where a transition can happen successfully. Fair process enables people to accept and do things for a specific outcome even though they might not like



the circumstances or be fully comfortable with them. Ideally, this chapter will encourage organisations to communicate their readiness, and thus lower the threshold for employees of *any* identity/background to be their true selves.

### **What is transgender identity?**

“Trans-sexuality” or “transgender identity” are commonly used to describe people who perceive or live their true identity to be different to their physical gender. Trans-sexuality is still listed as a dysfunction of gender identity in the medical diagnosis catalogue.<sup>2</sup> Other catalogues talk about gender identity disorder.<sup>3</sup>

Transgender people are everywhere: in the news, on fashion runways, in television series. We are exposed to them but only at a distance. Indeed, most of the people touched with a coming out and transition will often have no prior personal contact with the topic of transgender identity. As Rauchfleisch noted, “Only through the contact with a transgender person, people realise that they do not really know *anything* about transgender identity and that they have only a vague idea what such a person feels, what the path to the perceived identity entails and what the consequences are for anyone who is in contact with this transperson... Also, they can feel intense emotions when they meet this person: Irritation, discomfort, helplessness and even rejection. They may feel embarrassed and are maybe even surprised by themselves because they thought they were so open-minded and tolerant.”<sup>4</sup>

Today, a lot of coming-outs and transitions of trans-people happen in adult life, many at midlife or later. In a study by the Transgender Network Switzerland (TGNS), the average age of participants in the study was 44. For the transgender person, this mean putting her career at risk. She has probably tried other ways to cope with her transgender identity, hoping to find peace, but has ultimately come to the conclusion that the only way to find peace is to make the full step into her felt identity.

For some, the desire to come out may feel like a sudden explosion. Others approach it in a more controlled, determined way, taking time to reflect upon each step. Some leave their old lives behind, start anew in a new town, a new job, or find a new network of people. Others decide to transition in their existing environment, introducing their family, friends and colleagues to their long-hidden identity, which can propel these people out of their comfort zone and disrupt the environment.

There are many variations in between. However, I focus - based on my own experience - on the path of transitioning in the existing environment and in a controlled but determined way, and the subsequent impact of the transition.

### **Changing selves**

Our working identity is made up of many possibilities. Some are more tangible and concrete, others exist only in the realm of future potential and private dreams.<sup>5</sup> In addition, “changing careers means changing ourselves. Since we are many selves, changing is not a process of swapping one identity for another but rather a transition process in which we reconfigure the full set of possibilities. Working identity is above all a practice: a never-ending process of putting ourselves through a set of knowable steps that creates and reveals our possible selves.”<sup>6</sup> Hence, experiencing a transgender transition in close proximity can at the same time be a study in “changing selves” *and* a trigger for change for the person observing the change.

### **Triggers for change**

Triggers for change often involve a perspective transformation. “Perspective transformation can occur either through an accretion of transformed meaning schemes resulting from series of dilemmas, or in response to an externally imposed *epochal* dilemma. A *disorienting* dilemma that begins the process of transformation can result from an eye-opening discussion, book, poem or painting, or from efforts to understand a different culture—anything that contradicts our own previously accepted presuppositions. Any major challenge to an established perspective – or *epochal* dilemma - can also result in a transformation. These challenges are painful; they often call into question deeply held personal values and threaten our very sense of self.”<sup>7</sup>

A transgender transition can potentially be epochal or “just” disorienting, or both. It can create an epochal dilemma in her personal life if, for example, she is married, and/or has children. The spouse is now in a same-sex relationship that can be construed as completely different from the original relationship; children have to cope with suddenly having two mothers or two fathers. In the work environment, the transition is probably disorienting in nature, but could turn out to be epochal if it involves close, long-term and trustful professional relationships.

To summarize, transgender transitions are challenging for the individual and disorienting for those around him or her. This chapter explores the way

colleagues in the workplace experienced the transition, and what it does *to* them and *for* them.

## **METHOD**

In the summer of 2014, I conducted more than 150 conversations with colleagues and stakeholders in my work environment over a period of two and a half months. These conversations took place within the frame of fair process. A survey was also conducted online with other people who have undergone transgender transitions, and a few were interviewed later. The quantitative results were used to analyse how factors such as size of the company, industry or path of communication correlated with the answers from the interviews.

## **Key Findings and Discussion**

### **A disorienting dilemma**

The coming out and transition of a transgender person is for most people in their environment an event that is outside their frame of reference. In every interview it was confirmed that there was an initial disorientation among colleagues, but that it was rarely openly addressed because no one wanted to be the one who doesn't understand. Confused feelings were often mingled with respect for the transperson's courage to make the transition. Sometimes, at first, the disorientation wasn't even felt; questions and doubts came up only "when the dust had settled". As one interviewee noted, "Susanne sometimes brought me to the boundaries of my tolerance! She spoke with a high voice that was so different from her previous one. She was always made up and she dressed very feminine. She was always nice to everyone, even when, as a manager, she should have been tougher. Sometimes I really wanted to go up to her, shake her and yell at her 'THIS IS NOT HOW WOMEN BEHAVE!' But I couldn't, could I? That would have made me a terrible person."

Some long-time colleagues feel betrayed: "When I learned about his intention to transition, it felt like I was losing a friend. I know it's stupid, he is still the same person, but I sometimes miss the *woman* I could talk to."

Changing self can lead to altered behaviours that can be highly irritating to the entourage, as described by one interviewee: “As a ‘he,’ she had been a tough project manager who also polarized people quite strongly. When she showed her true, softer self, people were confused. They didn’t know how to react to this new side of their colleague and they always made comparisons to before. In some way, the old ‘he’ to them was more real than the new ‘she’.”

The act of coming out can also act as a catalyst for change in other people. Throughout the surveys and the interviews, one recurring theme was respect for the transitioning individual. The courage to take this step served as inspiration for changes in other people around her.

### **Engagement is important**

Confronted with an unfamiliar situation, people feel helpless. By taking their questions and suggestions seriously, you put the ground back under their feet. When I went to see my superiors roughly four months before my transition, I had the clear intention to engage them by involving them in the planning of the transition. Even though the Head of HR offered to prepare an intranet statement immediately, meaning I could come to work as Angela the week after, I insisted on taking time to prepare a proper plan for the communication and the transition. The definitive transition date was set together with my team in Liechtenstein.

Out of the 150 people I wanted to talk to, 68 took the form of individual one-to-one conversations, and the others through group talks of 2 to 26 people. In each conversation I emphasized how important it was to me to inform them personally. I asked each one to keep the information in confidence, so I could share the news in person with as many individuals as possible. From the moment I informed my team in Liechtenstein to the Friday before the transition when it was announced on the Group’s Intranet there was not one rumour in the entire Group.

In these conversations, with only a few exceptions, everyone mentioned how they appreciated receiving the news in person. The intimacy created a space where existing connections could get stronger, or a new bond could be created. I had the privilege to experience this with people I had known for many years and with some I had known only for a few months. The exchange of vulnerabilities shows the mutual trust between oneself and one’s peers. The discussions also gave room to voice their discomfort, and I in turn complimented them on having the courage to express it.

## **Explanation creates understanding which in turn creates support**

Except for one interviewee,<sup>2</sup> the coming out of an employee or colleague was their first personal contact with transgender identity. By 'first contact' I mean that someone from their immediate environment informed them that she was transgender and intended to change her gender expression to that of the opposite sex. There was always a degree of helplessness at first, because of the surprise and unfamiliarity of the topic. Even though people are familiar with the term transgender, there is very little up-close-and-personal experience. As one interviewee noted: "There were a lot of questions, of course. The really intimate question came at a cocktail party that we organised ourselves afterwards, just the girls. We would never have asked them in front of our bosses. Susanne answered all questions very honestly and clearly." As such, this makes the process of mutual communication and engagement even more important, as a way of engaging others in the process.

## **Practical Implications**

Based on the findings from the interviews and my own personal experience, a number of practical actions may be taken to facilitate the transition of the transgender person as well as her environment in the workplace, notably in the form of fair process and active engagement.

### **Engage the work environment**

Fair process is a way to actively engage people who are directly affected by the change of an individual. Such a process is key to a successful transition. The first condition for engaging others is that the person transitioning has self-confidence and is fully engaged herself in this step. Once you are out, you are out. By informing superiors, peers and subordinates of the facts and by asking them to participate in the planning or sharing some steps of the transition, they become part of the journey and part of the solution. The question is not *if* it should happen but *how*. By letting them know about the imminent change in advance, they feel respected and appreciated.

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<sup>2</sup> The interviewee is in charge of LGBTI (Lesbian-Gay-Bisexual-Trans-Intersex) inclusion in her organisation and has had prior knowledge of and contact with transgender topics.

An important aspect of engagement or disengagement is helplessness. When people have never been confronted with this kind of transition before, they can be overwhelmed and feel helpless because they do not know what to do or how to react. Professionals, especially top managers, do not like feeling helpless. They are used to being on top of things. Helplessness makes them uncomfortable, and as a result they may jump into actions before thinking them through in order to avoid feeling helpless. Through taking the time and asking them for advice on timing, communication or other elements of the transition that are within their scope of experience, their sense of helplessness is removed and engagement is secured.

### **Explanation and reassurance**

Sharing one's story is important to let colleagues understand that this is not an impulsive decision. An entire life has been building up to this moment. This takes them from thinking "Our male colleague is suddenly coming to work dressed as a woman" to "Here is a human being who has tried her entire life to find harmony between her physical gender identity and her perceived gender identity."

For everyone who experienced this as a first personal contact with transgender identity, answering their questions helps to close the knowledge gap and understand the transition process. The better they understand, the more likely they are to support it. Being confident and passing on the sentiment that she knows what she is doing mitigates the anxiety of the people around. Sharing one's own anxiety during the first encounter also helps other people to accept and voice their own anxieties.

### **Expectation and process control**

Control of the process and decision is another key element of a successful transition. Fair process includes engaging the environment and inviting their ideas and planning the transition, but the final decision is made by the person in charge. Similarly, decisions about the transition process remain with the transgender person. It is *her* change. My research findings showed that in a white-collar environment, the person transitioning usually will have the necessary skills to manage her own process.

## **Conclusions**

Having worked with the three elements of fair process throughout my transition, I can only say that if I had to do it again, I would do it the exact same way. I also found many elements of these principles when I looked at successful transitions in other companies. Except in one case, it was always the person transitioning who owned the communication. In all but one case, there was a short break of two to three weeks before the transgender person returned to work with her new gender expression. There was always a well-planned amount of communication from the initial 'outing' to the actual transition.

Hopefully, this article shows that a transgender transition in a company, when supported (but not led) by the employer, is not disruptive to the work environment. On the contrary, it makes the work environment more humane and employees proud and engaged because they work for open-minded employers. It sets free energy when the transgender employee can be herself, rather than using her energy to hide parts of herself. It encourages others to be themselves and thus creates a more diverse and authentic workplace.

## **About the Author**

In January 2013, Angela Matthes became CEO of Baloise Life (Liechtenstein) Inc., a business unit of the European insurance group Baloise. She had been with the group for 32 years in different responsibilities. Designated male at birth, transidentity has been a part of most of her life. At the age of 17 she came out to her parents for the first time. They, along with a psychiatrist, were not prepared to help with her situation. After a number of exhausting sessions over a period of six months, she buried her transidentity again, but it was always present and found different outlets over time. Since August 2014, Angela has lived and worked with love and appreciation for an environment that fully supports her identity change.

<sup>1</sup> Mezirow, J. (1991). *Transformative Dimensions of Adult Learning*. San Francisco, CA: Jossey-Bass.

<sup>2</sup> ICD-10-GM (2012). *Internationale Statistische Klassifikation der Krankheiten und Verwandter Gesundheitsprobleme*.

<sup>3</sup> Rauchfleisch, U. (2013). "Kapital 2. Was ist Transidentität?" In *Anne wird Tom - Klaus wird Lara: Transidentität/Transsexualität verstehen*, Germany: Patmos Verlag.

<sup>4</sup> Rauchfleisch, U. (2013).

<sup>5</sup> Ibarra, H. (2003). "Changing Selves, Changing Careers". In *Working Identity: Unconventional Strategies for Reinventing Your Career*. MA: Harvard Business School Press, pp.124.

<sup>6</sup> Ibarra, H. (2003).

<sup>7</sup> Mezirow, J. (1991).



# Out of the Closet, Into the Boardroom

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Stevin Veenendaal

## The Starting Point

Openly gay men and women are a rarity in the c-suite. They remain carefully hidden in the proverbial closet and rarely reach the top, in spite of the fact that openly LGBT leaders bring much needed, unique and essential qualities to the leadership task. It is largely unknown how openly gay executives adapt their leadership roles; their career narratives have not been researched. It is equally unknown if being openly gay in the boardroom influences leadership.

## Idea In Brief

Seven highly successful, visible and openly gay leaders of industry shared their personal stories in a series of interviews. In a nutshell, the interviewees suggest that a minority sexual identity does indeed significantly influence leadership – for the most part positively – in several ways:

- Their outsider status and bicultural perspective result in more creative and out-of-the-box approaches.
- Constantly assessing possible threats and dangers has given them a heightened emotional intelligence in business.
- Having experienced being in a minority first hand, they actively promote diversity and inclusion in their companies.
- A non-normative sexual orientation has given them a greater determination and drive to prove themselves.
- Their awareness of what is considered ‘masculine’ or ‘feminine’ behaviour influences, and at times changes, their leadership style.
- Life experience has taught them that authentic leadership is key—personal façades are always bad for business.

## Idea In Practice

Workplace diversity has many bottom-line benefits when handled well. Different customer groups are better understood and served, teams and boards reach fuller decisions after initial dissent, and a truly inclusive corporate culture gives employees a real sense of connectedness, which likely allows them to better leverage their talents. Yet the board members and top executives leading the diversity initiatives are, more often than not, golf-playing, white, middle-aged men with comparable educational backgrounds, business clubs and professional networks. So while diversity and inclusion are important, most companies are not 'putting their money where their mouth is'.

This homogeneous executive layer has serious side-effects. Sexual identity management at work (in the form of identity denial or concealment) is a reality for around 40% of LGBT professionals in the US, the UK<sup>1</sup> and the Netherlands in 2015.<sup>2</sup> Vacancies at the top are almost exclusively occupied by those who fulfil the deeply internalized 'great white man' leadership ideal, or by men who remain 'in the closet' if that is what it takes. LGBT leaders manage aspects of their identity to fit into the existing corporate elite by behaving in traditionally masculine or feminine ways, in the c-suite and at boardroom level.

## Introduction

On the 30th October 2014, Tim Cook, CEO of Apple, made an announcement in *Bloomberg Businessweek*. He publicly acknowledged that he was gay and described the profound influence this had had on him: “Being gay has given me a deeper understanding of what it means to be in the minority and provided me with a window into the challenges that people in other minority groups deal with every day. It’s made me more empathetic; it has given me the confidence to be myself, to follow my own path, and to rise above adversity and bigotry. It’s also given me the skin of a rhinoceros.”<sup>3</sup>

His courageous statement makes Cook the first and only openly gay CEO in the so-called “Fortune 1000”, the 1000 largest publicly listed companies in the United States. It is significant and highly relevant when discussing leadership and a sexual minority position.

In literature, society and in research, successful leadership is often associated with white men and masculine traits. Unfortunately, “great man” leadership theories fall short in societies where women comprise almost half of the workforce and racial, ethnic and other minorities are gaining ground in leadership positions. Such cultural stereotypes pressure minorities in the business world to adhere to the leadership style of the heterosexual male majority. They also reduce access for women and minorities to leadership positions, and undermine faith in their leadership once they occupy such positions.

As such, defining and understanding leadership by simply examining those who hold leadership positions has led to a biased and incomplete portrayal of leadership and leadership effectiveness.<sup>4</sup> There is a discrepancy in many corporations between having diversity and non-discrimination policies in place, and actually fostering a culture that is truly inclusive, open and diverse. The closer we get to the power elite in larger organisations, the more hiding and covering seems to take place. To change the current situation will require committed gay corporate leaders willing to share their leadership stories and put faces to the discussion, complementing the progress made so far.<sup>5</sup>

In this chapter the leadership approaches of senior executives and leaders who do not fully fit the leadership stereotype are examined. The aim was to find out how a minority sexual orientation influences the enactment of leadership. If Tim Cook is at all representative, that influence may prove to be substantial.

## **Sexual identity management**

Sexual identity management is still vital for LGBT professionals. One suggestion is that being transparent about one's sexual orientation may obstruct career advancement and that many talented professionals "feel their career success depends on the suppression of their identity".<sup>6</sup> Furthermore, "decisions to disclose sexual orientation by LGBT leaders likely are complicated both by their own internalized stigma as well as by others' judgment about the way they handle their identity."<sup>7</sup> Gay leaders and employees feel they have to manage aspects of their identity to fit into the existing corporate elite and "behave in traditionally masculine or feminine ways".<sup>8</sup> Many gay men feel "compelled to adhere to traditional enactments of masculinity, even if it is not who they truly are". It seems that "an openly gay male leader may be perceived as effective only to the extent that he does not transgress gender norms too obviously or 'flaunt' his homosexuality".<sup>9</sup>

But hiding or covering parts of a stigmatized identity is not exclusive to the gay or lesbian executive; it is a widespread phenomenon that takes away energy from the leadership task. The term "covering", coined by sociologist Erving Goffman in 1963, and further developed by Kenji Yoshino in 2006, describes how even individuals with a known stigmatized identity that is already out in the open still make a great effort to keep that identity from being too visible or too noticeable.<sup>10</sup> In Yoshino's study, covering occurred with greater frequency within groups that are historically underrepresented, such as LGBT professionals—as would be expected. At the same time, of the more than 3,000 persons interviewed for his research, about half of the straight, white men also reported covering—even though they are not the focus of most inclusion efforts.<sup>11</sup> In other words, professionals of all backgrounds, all nationalities, all skin colours, and any kind of (sexual) orientation regularly feel the need to hide their vulnerabilities in order to simply to fit in.

## **LGBT leadership traits**

Openly gay senior leaders appear to have some unique leadership behaviours. They have a bicultural perspective that "facilitates an understanding of the rules by which the mainstream culture operates, while simultaneously [allowing them] to envision new forms by which the same tasks might be accomplished".<sup>12</sup> Another element is their experience of marginalization, otherness, alienation, or an outsider status that most gays and lesbians will recognize, regardless of the presence or lack of a supportive environment. This outsider status enables LGBT persons to "see differently, hear differently, and thus potentially challenge the conventional wisdom."<sup>13</sup> A

third element is the impetus to create new rules or approaches, as, for instance, when you are the first and only openly gay CEO in a Fortune 1000 company. For these reasons, as leaders, lesbians and gays often have more “normative creativity [...] and the ability to create boundaries that will work where none exist from tools that may be only partially suited to the task”.<sup>14</sup>

A study of 3,000 working professionals and 150 gay male leaders looking to identify characteristics of gay executive leadership found that gay male executives excel in three fundamental leadership skills: adaptability, intuitive communication and creative problem solving. Gay men are very familiar with the role of the outsider within society, and adapt their verbal and non-verbal communication to avoid problems. As outsiders, they perceive the world differently and develop self-awareness and basic critical thinking in order to get along in the world. They learn from a young age to predict the emotional reactions of others and to scan for subtle hints and possible dangers. This so-called “adaptive unconscious” is an early warning system—a strong internal voice of “intuitive communication”.<sup>15</sup>

Another study found that leaders from minority identity groups appear to possess distinct leadership behaviours. First, they perform especially well, since they have to meet a higher standard to achieve the leadership position to begin with. Second, they have learned to negotiate both minority and majority cultures. Third, they tend to include diverse team members with unique ways of working and problem solving, thereby deterring groupthink and taking full advantage of diversity.<sup>16</sup>

However, beyond the findings reported above, little attention has been paid to the way an LGBT identity might influence the enactment of a leadership role, including the response of the group being led.<sup>17</sup> There have been calls for talking directly to senior lesbian or gay executives who have come out and are willing to talk about their experiences,<sup>18</sup> suggesting that to “explore the narratives of those who have come out at work and experienced success regardless of orientation may provide key insights into some ‘best practices’ for gay professionals who desire to be out at work, but fear it could impact their careers long term”.<sup>19</sup>

An additional question is how LGBT people ascribe meaning to being a professional in diverse organisational settings.<sup>20</sup> It seems vital to study LGBT leadership not only to discover how these individuals incorporate their own experience into their leadership style, but also what LGBT leaders can teach us about contemporary approaches to leadership effectiveness.<sup>21</sup>

## **METHOD**

Between November 2014 and January 2015, seven face-to-face interviews were conducted with six men and one woman in the UK and the Netherlands. All of the participants self-identified as lesbian or gay and their sexual identities were publicly known within their organisations and in general. All seven participants were white; four were Dutch, three English. They ranged in age from 45 to 66 years, with an average age of 51. A qualitative research approach was chosen, using phenomenology as the basis for inquiry. Thematic analysis was then applied to data from the in-depth, semi-structured interviews in order to identify patterns and themes.

Four participants receive regular media coverage and are highly visible as openly gay leaders: Lord John Browne, former CEO of BP; Ashley Steel, former board member of KPMG UK and Europe; and Viktor Horsting and Rolf Snoeren, founders of international fashion label and design house Viktor&Rolf. The other participants were Cees Buren, CFO of Dutch healthcare organisation RadboudUMC; Christiaan Bramer, head of legal affairs for Heineken in the Netherlands; and Robert Moffett, global director organisational development and change for Mars.

All participants agreed to participate publicly. While many LGBT leaders keep this specific part of their identity invisible from the general public, the men and woman in this study choose not to conceal their identities and share their personal stories with pride.

## **Key Findings and Discussion**

Rare as they may be, openly gay leaders are living proof that the commitment to diversity and inclusion goes beyond mere rhetoric. Several recurrent themes stood out in their narratives.

### **Their outsider status and bicultural perspective result in more creative and out-of-the-box approaches**

The openly gay leaders interviewed experienced outsider status and were all surprisingly aware of feelings of alienation and otherness, often resulting in a feeling of detachment. Robert Moffett of Mars said: “You try to play the game yet you never quite play it, you never fit in.” The founders of design house Viktor&Rolf had a similar experience. Viktor: “You have long lived with a secret and with something that makes you different from others. This changes how you relate to the outside world and gives you a feeling of distance.” Or as Rolf put it: “It is almost like a forced different perspective on the world. You see everything differently. I always have to switch things inside my head to what it would mean for me. That is the case for everything. I always have the feeling that I do not really belong.” Lord John Browne, former CEO of BP, said: “I am part of several minorities: my mother is Jewish and I am gay. I’ve always been in a minority and I’ve had to work to be part of the majority... I was always slightly an outsider.” Ashley Steel, former board member of KPMG UK and Europe, recalled: “You go home after you have been to a very male- dominated dinner, where all the women are in dresses and you are in your black trouser suit, because that is how you choose to dress... you can’t help being slightly emotional, that takes away a little bit of your energy.”

There was a consensus among all the interviewed leaders that they do not fit the leadership stereotype and live, think and lead differently. Their outsider status and bicultural perspective, however, also gives them the ability to adapt and to find more creative and out-of-the-box solutions. All the executives have turned their bicultural perspective into a distinct corporate asset.

### **Constantly assessing possible threats and dangers has given them a heightened emotional intelligence in business**

The openly gay executives all mentioned that they are more self-aware, alert and intuitive when it comes to sensing and reading emotions of others and assessing possible threats and dangers. This heightened emotional intelligence has turned out to be a great asset and skill in leadership, according to the executives, as they have learned to utilize this skill in virtually any corporate situation.

Christiaan Bramer, head of legal affairs of Heineken in The Netherlands said: “Being different has greatly developed my ability to read people. I am very good at sensing dangers or impurities.” Ashley Steel mentioned a similar tendency as she discussed disclosing her identity under various

circumstances: “You always have to ask yourself: where am I, does it matter?” Or as Lord John Browne said: “I think you are much more emotionally intelligent. When you are gay, you’re always reading people. And certainly when you are in the closet, you are absolutely reading people. One of the skills you get is that you sense where danger is, and that is quite a benefit... because people very rarely say what they really think.”

### **Having experienced being in a minority first hand, they actively promote diversity and inclusion in their companies**

They all mentioned being much more open to diversity, and they actively promote inclusion. They see, search for and prefer diversity. Having experienced the minority position first-hand, they feel a responsibility to not only make sure employees can be themselves within their organisations, but also to actively recruit the odd ones out.

Viktor Horsting said: “What I notice is that we have a preference for something that is different. We value diversity, appreciate certain kinds of people and we are not looking for average people, regardless of whether they are gay or straight.” Rolf Snoeren added “I actually enjoy it when people are a little bit different.” Cees Buren, CFO of RadboudUMC, mentioned: “I believe that when you have experienced a certain struggle over the years, you are more interested in people and want to make them feel they can be themselves in their work.” Reflecting on his 12 years as CEO of BP, Lord Browne talked about how being part of a minority clearly influenced this particular aspect of his leadership: “There is something about being an identified member of a minority which allows you to think more clearly about how to include people as a leader. I have a responsibility to do that, because on the matter of inclusion of minorities, constant vigilance is needed.”

### **A non-normative sexual orientation has given them a greater determination and drive to prove themselves**

The unique challenges gay leaders have had to face, as well as not having a traditional family set-up, creates a determination and drive to succeed for most of them. It is almost as if openly gay leaders still feel the need to prove they have every right to the position they hold despite their indisputable professional success.

Ashley Steel referred to gender and sexuality when she said: “It made me more determined, I wasn’t going to be denied. No one was going to deny me access to senior positions because I was either a woman or because I was



gay. That is definitely a driver.” Rolf Snoeren also noted this determination: “We have long had the feeling of ‘us against the rest of the world’ and we still do a little. We battled for a long time with little success. Perhaps knowing this feeling of loneliness makes it easier.” Viktor Horsting added: “And not having a real connection to the world around you makes it easier to plow on alone.”

### **Their awareness of what is considered ‘masculine’ or ‘feminine’ behaviour influences, and at times changes, their leadership style**

What became very clear during the interviews is that most gay leaders, at the very least, seem more aware of how masculine or feminine they feel they should behave. Femininity and leadership do not seem to go hand in hand. Our collective ideas about what constitutes (1) female behaviour and femininity, and (2) good leadership have been constructed around the idea that leaders should be heterosexual white men. Put simply, strictness, business acumen and corporate behaviours are considered masculine and heterosexual. Beauty, creativity, friendliness and ‘soft’ behaviours are considered feminine and homosexual. The gay leaders interviewed seem to internally negotiate the appropriate levels of masculinity and femininity depending on context and situation, in spite of their considerable career achievements and stellar reputations. Frequently, this causes them to conform to traditionally accepted behaviours and to cover up assumed “imperfections”.

Viktor Horsting said: “When I have to operate business-like, there is not so much the feeling that there is something to hide, but more that there is something in me that I have to kick. Something that does not belong to being gay. Let’s be corporate and put on a jacket.” Or as Lord John Browne put it: “You see the gay person who is pretending to be overly masculine. And you see some women leaders suddenly trying to be like a male leader, rather than being comfortable as themselves. And they never succeed. Women and gay people have very similar problems in business, which is how to create the self-confidence to be yourself.”

### **Life experience has taught them that authentic leadership is key—personal façades are always bad for business**

A final aspect all the openly gay leaders agreed on is that hiding an essential part of one’s identity – any part for that matter – is a major waste of energy and makes authentic and sincere leadership impossible. Most executives speak from experience, some leading from within the closet for decades. It is evident to them that employees and stakeholders alike will question the

effectiveness of a leader who is unwilling or unable to openly show possible vulnerabilities. The message is simple: façades are always bad for the individual and for business.

Lord John Browne stressed the importance of having successful role models: “It really matters to get role models out there, because all the processes, all the lecturing, everything is in place. There is nothing better than seeing people like you being successful in business and being out. Role models really matter.” Ashley Steel believes that real change starts at the top of the organisation, and confirmed the importance of having openly gay leaders: “I do believe change within business has to come from senior business people. If you don’t have senior business people either being gay or shouting and screaming about the acceptability of being gay, it is always going to be tricky for an organisation. So it is very, very important.” Openly gay leaders today may pave the way to change that corporate culture, or as Lord John Browne said: “Generations are affected by prior generations. It is rare for younger generations to just completely reject what they see. They need to be given permission not to imitate. I think part of it is generational, but that’s only part of it. The other one is fixing the standards and the culture to say: ‘It’s okay to be different. It’s good to be yourself.’”

## **Practical Implications**

Diversity is vital in all layers of a corporation to spark creativity, generate unique solutions, and unlock insights into how to best reach a diverse customer base. For those reasons, and many more, minority leadership and inclusion are increasingly hot topics. In spite of great progress, however, true inclusion still seems to depend on visible and invisible conditions. When the benefits are so obvious, one would expect companies to focus their efforts on actively recruiting and retaining a diverse executive layer. This is not the case and the lack of progress in terms of diversity is especially apparent at the top of organisations.

Such efforts can never be a one-off initiative rolled out in a certain quarter by merely implementing diversity and inclusion policies. A good start, certainly, yet where is the diversity in our boardrooms and in our executive layers? What happens when our employees look at their corporate leaders for inspiration and examples? What message does a uniform and homogeneous executive layer send when employees try to figure out whether it is safe for them to come out, to champion a minority position, to ask for flexible working

hours, to speak up against the majority, to spend more time with their kids, or be “different” in whatever way?

The personal narratives of the seven openly gay executives make clear that a multicultural boardroom and executive layer bring unique qualities and perspectives to the organisation. Yet, unfortunately, many leaders still feel the need to hide their sexuality and remain in the closet, boards are largely unchanged, and virtually all employees seem to go to great lengths to cover assumed imperfections and vulnerabilities. Corporations miss out on the unique qualities, solutions, creativity and variety a truly multicultural workforce can bring into the organisation. As employees are not able or willing to bring their true selves to work, imagine the expense for the company in terms of lower productivity or missed revenue from previously overlooked customer groups. Quite simply, we have come a long way, but we now have to take diversity and inclusion efforts to the next level.

Managers and executive boards can make sure there are strong role models within the company; not just one larger-than-life or charismatic chief diversity officer, but diverse role models throughout the organisation (different gender, age, physical ability, ethnic background, sexual orientation).

Another action is to identify your customer base and your employee needs, and find out if the executive layer and workforce really reflect the demographic you serve. Affinity and interest groups within the organisation that are attended or chaired by established and diverse executives or board members can also unify individuals around diversity issues.

Management can also look for new and different employees, in new and different places. Recruitment efforts should focus on bringing diverse, multicultural candidates into the company and into the boardroom—and retaining them.

Additionally, all employees should receive diversity and management training from the minute they set foot within the organisation, regardless of their level or position. And finally, companies should measure diversity and inclusion, and benchmark the results against truly multicultural companies within their sector.

## Conclusions

The executives in this study are openly gay and successfully give meaning to their leadership roles, within their organisations, and in society. They have achieved this level of success because of their differences, not in spite of them. If younger generations look to these leaders for inspiration, we might actually see many more openly gay CEOs in the Fortune 1000 in years to come. And if the conclusions of this study are anything to go by, that will be an enrichment not only for LGBT individuals, but for organisations and all those within them.

## About the Author

Stevin Veenendaal is founder and owner of Dutch training and consulting company Het Binnenwerk (The Inner Works in English). The focus of Het Binnenwerk is on leadership, diversity and team development. Stevin has over 15 years of international training and consultancy.

<sup>1</sup> Hewlett, S. A., Sears, T., Sumberg, K. and Fagnoli, C. (2013). “*The Power of ‘Out’ 2.0: LGBT in the Workplace*”, Centre for Talent Innovation.

<sup>2</sup> Kuyper, L. (2013). Seksuele oriëntatie en werk: Ervaringen van lesbische, homoseksuele, biseksuele en heteroseksuele werknemers [Sexual orientation and work: Experiences of lesbian, gay, bisexual and heterosexual employees]. *Sociaal en Cultureel Planbureau*.

<sup>3</sup> Cook, T. (2014, October 30). “Tim Cook Speaks Up”, *Bloomberg Businessweek*.

<sup>4</sup> Lau Chin, J. and Sanchez-Hucles, J. (2007). “Diversity and Leadership”, *American Psychologist*, 62 (6), 608-609.

<sup>5</sup> Hewlett, S. A., Sears, T., Sumberg, K. and Fagnoli, C. (2013).

<sup>6</sup> Hewlett, S. A., Sears, T., Sumberg, K. and Fagnoli, C. (2013:26).

<sup>7</sup> Fassinger, R. E., Shullman, S. L. and Stevenson, M. R. (2010). “Toward an Affirmative Lesbian, Gay, Bisexual, and Transgender Leadership Paradigm”, *American Psychologist*, 65 (3), 209.

<sup>8</sup> Zweigenhaft, R.L. and Domhoff, G.W. (2006). *Diversity in the Power Elite: How it Happened, Why it Matters?* Lanham, MD: Rowman & Littlefield, p. 222.

<sup>9</sup> Fassinger, R. E., Shullman, S. L. and Stevenson, M. R. (2010:210).

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- <sup>12</sup> Brown, L.S. (1989). "New Voices, New Visions", *Psychology of Women Quarterly*, 13 (4), 450.
- <sup>13</sup> Brown, L.S. (1989:451).
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- <sup>15</sup> Snyder, K. (2006). *The G Quotient: Why Gay Executives are Excelling as Leaders... and What Every Manager Needs to Know*. San Francisco, CA: Jossey-Bass.
- <sup>16</sup> Eagly, A.H. and Lau Chin, J. (2010). "Diversity and Leadership in a Changing World", *American Psychologist*, 65 (3), 216-224.
- <sup>17</sup> Fassinger, R. E., Shullman, S. L. and Stevenson, M. R. (2010:202).
- <sup>18</sup> Collins, J. C. and Callahan, J. L. (2012). "Risky Business: Gay Identity Disclosure in a Masculinized Industry", *Human Resource Development International*, 15 (4), 455-470.
- <sup>19</sup> Collins, J. C. and Callahan, J. L. (2012:467).
- <sup>20</sup> Rumens, N. and Kerfoot, D. (2009). "Gay Men at Work: (Re)constructing the Self as Professional", *Human Relations*, 62 (5), 783.
- <sup>21</sup> Fassinger, R. E., Shullman, S. L. and Stevenson, M. R. (2010:213).

## Commentary on Part Four

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The papers in this section show how varied rites of passage may be—the aftermath of a divorce, what childless individuals can do for posterity, or revealing one’s sexual identity in the workplace. What they have in common is the (desired) achievement of a newfound sense of self, freedom and empowerment and the mastery of both internal and external worlds.

What is also clear, is that however destabilizing transitions may be, the state of crisis also creates the very conditions for change. The often dreaded place of self-questioning and reflection requires taking responsibility for one’s past and current situation and decisions, which then unlocks the keys to the future. This acceptance and letting go allows them to come up with unexpected, unforeseen solutions to what originally seemed to be insurmountable dilemmas.

Moreover, while originally personal in nature, life changes such as those profiled have implications for the work realm, be it succeeding in a professional career for a divorcee, the pursuit of entrepreneurial activity in the form of a “brain child” or mentoring the younger generation for business success for those who cannot have children of their own, and the subtle sensing skills that have developed as result of being in a minority (LGBT) that can be used to lead others effectively.

### **What lessons can be drawn?**

The papers in this chapter highlight not only the normality of distress in transitions, but the need for such unsettling states to stimulate change. They also illustrate the important role of others in the transition process.

- Lucia Ballori shows how “decoupling” or the breakdown of a core identity such as being married can be a blessing in disguise, leading to back-to-basics identity work and renewed self-awareness, independence and empowerment. She also shows the influential role of others in the process: a good and empathetic support network facilitates transitions; a discriminatory or punitive social network can make it so much harder.

- Likewise, Hestie Reinecke argues that state over which one has little control such as *childlessness* does not have to be an endgame. Individuals seeking meaning through generativity have other realistic and pragmatic options. She highlights self-awareness and emotional regulation as important coping skills.
- Angela Matthes shows how a personal transition can lead to systemic changes in the organisation. She also advocates the use of *fair process*, engaging others in the process, to assist the organisation in various forms of transitions.
- Stevin Veenendaal argues that, by virtue of being in the minority, openly gay executives bring unique benefits to leadership roles. Their 'difference' should be seen as advantageous, not only to how they lead themselves but how they lead others.



PART FIVE

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# FACILITATING TRANSITIONS



The chapters in this section provide a number of concrete solutions to facilitate identity work, transitions and career progress. This section explores individual and group coaching as a means to create a safe reflective space in which people can focus on their internal development and identity work during periods of transition.

Alessandra Agnoletto's chapter on *leadership identity work in coaching* explores how coaching can overcome the invisible barriers to women's advancement that arise from second-generation gender bias. She shows how women leaders successfully create a transitional space with a coach, or in a coaching program, in which they can integrate a better understanding of their own leadership identity.

Martine van den Poel's paper focuses on *delegation as a key enabler* for leadership development. She explores the mechanisms, such as perfectionism, that underlie micro-management. The need to control can take up so much time and energy that women (and men) are unable to invest in other key leadership tasks such as developing a general manager's perspective and building a network. These may be rooted in the belief that they should be nurturing and protective, and hence they "mother" people in the workplace through micromanagement.

# Women's Leadership Identity: Coaching in Practice

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Alessandra Agnoletto

## The Starting Point

My upbringing as young girl began at the age of eight reading the “Little Women trilogy” and continued with Simon De Beauvoir’s books and Oriana Fallaci’s bestseller “Nothing and so be it.” I've always been fascinated by the world of women and their nature and characteristics. As a former senior executive and now as a coach, I wanted to analyse how I could help women build their own identity as a leader and reach the level they deserve in the corporate world.

## Idea In Brief

The “think manager – think male” stereotype associated with effective leadership remains dominant in business culture. This undermines women’s capacity to see themselves as potential leaders. Coaching can provide a safe reflective space to support senior female managers in building and internalizing their leader identity and overcoming the invisible barriers to women’s advancement. From interviews with six women leaders on their experience of being coached in leadership development, the findings were as follows:

- Coaching provided women leaders with a safe, reflective space for identity work.
- Coaching allowed women leaders to distance themselves from masculine role models.
- When a woman managed to strengthen her internal image and was strongly motivated to build an identity as a leader, organisational factors were less influential.

## **Idea In Practice**

With a coach, women leaders can successfully co-create a transitional space in which to experiment with new leadership identities and activities in order to define and internalize their own definition of leadership. Coaching can help women to better integrate their different roles (leader, mother, wife, daughter), allowing them to achieve a greater level of harmony. Coaches should thus consider developing specific knowledge and skills of how gender issues impact leadership identity development.

## Introduction

The process of developing a leader's identity means more than being formally appointed to a leadership position. It also involves internalizing that identity and developing an elevated sense of purpose aligned with one's self-concept. Internalizing a leader's identity requires experimentation with new behaviours. The feedback received from followers on the leader's behaviour is of fundamental importance to validate his or her self-view as a leader. As such, the construction of the leader's identity is a mutual process between leader and follower that may produce either a positive or a negative spiral.

One of the most significant advances in executive development is its increasing reliance on methods that take place *in situ*, notably action learning and coaching.<sup>1</sup> For women, coaching interventions "should not only address specific leadership skills but also explore the client's perceptions of the fit of their gender identity at work."<sup>2</sup>

### METHOD

Semi-structured interviews were conducted with six female leaders from diverse functions, regions and business sectors. They were between 40 and 50 years old and had different family situations (single, married with/without children).

Participants were asked to talk about three stages of their leadership development experience: (1) Life pre-coaching—models of leadership pre-coaching, definition of the leadership construct, models of leadership at the company and whether there were female role models, (2) Experience of coaching—description of the coaching experience, transformations experienced as a leader and as a woman, and the attitude of the organisation towards the change, and (3) Post-coaching—change in definition of leadership after coaching, achievement of objectives, and whether there was greater harmony between the different roles and identities.

## Key Findings and Discussion

Through content analysis of the interviews, a number of key themes emerged related to self and leadership identity work:

### **Coaching provides women leaders with a safe, reflective space for identity work**

All the female leaders interviewed had followed a coaching program in order to support career advancement. However, coaching became more than a process to improve individual performance; it also provided an opportunity to work on their identity as a woman leader. For all of the women interviewed, the most important results of coaching were increased self-awareness and enhanced self-esteem, which in turn laid the basis for construction of their self-view as a leader. Alice, a managing director in a financial institution and board member in two companies, described her coaching experience as the possibility to “see things through new eyes,” to face her fragility by accepting that she “no longer (needed to) be perfect and look at herself with greater compassion”.

For most women, the element of introspection during coaching was crucial in working on their self-worth and self-understanding. For Stephanie, a senior executive at an online service company, the coaching program was: “a great journey leading to a place I did not know, and where I’d probably afraid to venture alone, that allowed me to explore parts of my personality that previously I did not want to see as being bossy or not wanting to get in touch with my feelings.”

As leaders progressed from novice to expert, they were driven more by internal values than the desire to align their behaviour to implicit pressures of what constituted effective leadership.<sup>3</sup> Through coaching, women could construct an authentic leadership style that reflected the most intimate expression of their own values and beliefs, not default models of leadership in the organisation or management training. Lorraine, now a managing director of a multinational company, was enrolled by the company in an eighteen month coaching program before appointing her to the new role. The experience allowed her “to acquire greater awareness of who I really am, of my resources and capabilities... to place brick upon brick... increasing my self-esteem, and gradually building up the confidence needed in covering a role of command, on the basis of a different style of leadership of my previous boss.”

**A leader identity based on personal values and characteristics is associated with motivation to lead.**

In the interviews, the women voiced a desire to create “a working environment in which people do not feel oppressed but are happy to come to work” and where “femininity is perceived as an asset”. They expressed their willingness to adopt a leadership style based on empowerment, respect for the contributions of individuals, and values such as transparency, reliability and integrity.

**Coaching allowed women leaders to distance themselves from the dominant role models endorsed by the organisational culture and develop their own model**

Coaching provided the space for women leaders to construct their own definition of leadership, free of the implicit theories of leadership espoused by the organisation. This is particularly important for women who, in the absence of female role models, risk appropriating a male leadership model at the expense of their feminine characteristics. Coaches can play a key role in encouraging their clients to experiment with new behaviours in order to build on experiences that foster themselves as leaders. In some of the stories it was clear that the coach had been able to create a transitional space in which the coachee was able to manage her own anxiety about implementing a model of leadership different from the existing one, encouraging her to be the agent of a cultural change.

Tanya, a senior manager of a multinational manufacturing company, reported how “During the coaching sessions I realised I had been unconsciously engaging in behaviours of my former boss’s leadership style that I disliked.” Through discussions with her coach she understood that “The definition of a leadership style must go through self-examination to identify one’s own value and one’s own limits to work on.” In doing so she was able to find peace of mind and accept that “there is no abstract model of leadership but the model is inside you. You cannot force a model if you want to be authentic and find a balance for yourself and be perceived by others as complete.”

**Women felt very strongly about not having to abandon their gender-specific assets or “femininity” in their identity work**

The women in the sample shared an ability to overcome the psychological barrier of having to “act like a man” in order to be respected as a leader by their followers. Through coaching they could work on more agentic characteristics such as assertiveness and self-esteem – without feeling

“masculinized” – while preserving their gender-specific assets. All of the respondents recognized the importance of being able to fully enjoy their feminine side while occupying a top position. For example, the possibility of not having to hide their femininity in “masculine-cut clothes and aggressive behaviour,” but “to remain credible” by choosing the look that they felt best represented them. Lorraine reported that during the coaching program she started to “wear more feminine and elegant clothes, choosing heeled shoes and clothes which suit better my slim figure, wearing make-up and changing hairstyle... I suddenly realised that the change in my inner state was reflected in my external appearance.”

### **Women leaders with a strong identity as a leader are less reliant on or influenced by organisational stereotypes**

Finally, it emerged that when a woman manages to strengthen her internal image and is strongly motivated to build her own identity as a leader based on her own values and characteristics, organisational factors play a less important role in terms of reinforcing, both positively and negatively, her leadership identity. In this sense, coaching can be key in helping women on their path towards greater self-awareness, discovering their individual qualities and strengthening their self-esteem so as to create a virtuous cycle of self-motivation and reinforcement.

Stephanie stressed the importance for women to have the courage of building a leadership style to suit their own identity in order to feel authentic and comfortable with themselves: “Coaching helped me to get away from an almost mystical, more distant, and more difficult-to-achieve vision of leadership that requires being in touch with gut feelings, enabling me to develop a style closest to my nature, a more sober and relaxed style with fewer slogans and fireworks, but no less effective for that. I would describe it as a nice pair of simple, black shoes, timeless but with a twist—like red heels. A detail that at first sight can be missed... and I don’t even think this sobriety is boring because I put passion into everything I do.”

### **Practical Implications**

The findings from the interviews suggest a number of practical interventions.

Coaches should consider developing specific knowledge and skills on how gender issues affect leadership development. They must be aware that

organisations are not gender-neutral and help women leaders understand how they may be perceived in their specific organisational context and to determine how to best manage those impressions. As there is rarely a road map for being a successful woman leader, coaches should also help women find their own leadership style and manage the discomfort of not being aligned with the predominant leadership style of the company. They should keep in mind that woman leaders often struggle with managing different social roles at different stages of their lives (daughter, sister wife, mother), and help them integrate these roles to experience more harmony and life-balance.

Women should consider pro-actively engaging in coaching to reflect on specific issues concerning the integration of their different roles and identities. They could benefit not only from traditional coaching programs but also promote peer-coaching between women inside the company, and/or women from other companies or female associations.

### **About the Author**

Alessandra Agnoletto is Founder and Managing Director of Agnoletto & Partners, a boutique consulting firm operating in the field of coaching, training, organisational development, counselling and development/ assessment. Alessandra's expertise lies in coaching senior executives and their teams on leadership and change management issues in Italy and internationally. She is a member of the ICF (International Coach Federation). During her career she spent more than ten years in senior executive positions and as a board member of multinational companies.

<sup>1</sup> Ibarra, H., Snook, S. and Guillén, L. (2008). "Identity-based Leader Development". *INSEAD Working Papers Collection*, (32), 1-33.

<sup>2</sup> Karelaia, N. and Guillen, L. (2012). "Me, A Woman and a Leader: Antecedents and Consequences of the Identity Conflict of women Leaders", *INSEAD Working Papers Collection*, 117, 1-56.

<sup>3</sup> Lord, R. G. and Hall, R. J. (2005). "Identity, Deep Structure and the Development of Leadership Skill", *The Leadership Quarterly*, 16 (4), 591-615.



# Delegation: A Key Enabler for Senior Female Leadership Transitions

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Martine Van den Poel

## The Starting Point

My objective was to understand the key leadership transitions in which female leaders have to engage to close the gender gap at senior executive levels. Informed by my own coaching of female executives, I focused on the critical role of delegation as the enabler of leadership transitions.

## Idea In Brief

A large number of women form part of the labour force as successful managers and leaders; a much smaller number make the leadership transition from functional manager to general manager, and even fewer reach the executive committee of large organisations. This article explores the ability of women leaders to delegate, and the corresponding opportunity to engage in leadership transitions which allow them to step up to more senior executive positions.

Survey data was collected from 51 senior executive coaches who served as an “expert group.” Additionally, eight in-depth interviews were conducted with senior female leaders who were respectively tested as “high” and “low” delegators. The key findings of the study are:

- Delegation is a challenge for both men and women. However, women have a slightly harder time delegating than men, especially in the transition from a functional specialist role towards a broader, more generalized business or executive role.
- The obstacles to delegation differed strongly between male and female leaders. The top four blocking factors for female leaders were perfectionism, too-high sense of personal responsibility, fear of failure, and feeling overly protective of their team. The top four blocking factors for male leaders were need for control, difficulty letting go of one’s expertise, feeling “I can do it faster”, and fear of failure.

- Delegation is an enabler for other leadership transitions. It frees up the critical resource of time, which leaders can use to develop other skills for leadership advancement such as acquiring a general management perspective, building horizontal relationships with peers, developing strategic vision and developing an outside network.
- Female leaders should also engage in promotion strategies focused on their aspirations, advancement and accomplishments.

### **Idea In Practice**

Delegation is a key skill for both male and female leaders, especially as they strive for more senior positions. It frees up an important resource – time – but that time has to be reinvested in developing other critical leadership skills and becoming comfortable and confident with their identity as a leader. As a first step, recognizing and understanding the major blocking mechanisms to delegation will help pinpoint areas for development. A simple analysis of the respective time allocated to different relationships (peers, direct reports, superiors, outside stakeholders) can serve as a proxy for transition readiness. For example, if an individual is found to spend substantially more time with direct reports rather than peers and superiors, this suggests they have a problem delegating.

Women leaders should also engage in “promotion” strategies (as opposed to “prevention” strategies) such as developing and communicating a vision, developing a general management perspective, working on peer and superior relationships, and expanding their network, all of which contribute to making them more “visible” for higher leadership positions. In this way they in turn will create the conditions for female leaders to move upwards and – slowly but surely – close the gender gap.

## Introduction

In today's labour force, a large number of women are successful managers. A much smaller number, however, make the leadership transition from functional manager to general manager; even fewer reach the c-suite. Among the many reasons why women fail to reach these senior executive levels are subtle organisational biases such as not proposing women for senior positions, not providing the 'stretch assignments' to qualify for them for executive positions, or an absence of sponsors to rally support for their cause. Others include a personal choice not to pursue promotion in order to maintain their work/family balance, or a reluctance to engage in "political" games to get to the top.

While all these reasons are valid, this chapter looks at the challenges of the transition into an executive position. Research has shown that the path to senior management is marked by a transition whereby people hone critical skills and thus become comfortable and confident with their identity as a leader.<sup>1</sup> These skills include developing their strategic vision, developing a broad internal horizontal and external network, and developing more of a general manager mindset.<sup>2</sup>

A key transition that is often assumed to have happened before an individual reaches a senior position is the ability and propensity to delegate, which is often - but not always - learned in early managerial positions.<sup>3</sup> Delegating frees up time to develop other leadership skills required for executive positions. In short, if a woman masters the ability to delegate, she frees up precious time and mindspace to engage in the transition to leadership that will allow her to step up to more senior executive positions.

### Delegation as a key leadership skill

Delegation is defined as the assignment of authority and responsibility to another person to carry out specific activities. "Delegation may improve the speed and quality of decisions, reduce overload for the manager, enrich the subordinate's job, increase the subordinate's intrinsic motivation, and provide opportunities for subordinate development of leadership skills."<sup>4</sup>

In the clinical approach to leadership dynamics,<sup>5</sup> micromanagement and the corresponding need for control are seen as major impediments to delegation. Conflict avoidance also constitutes a blocking factor, as the need to please or to avoid 'rocking the boat' inhibit effective delegation. The 'impostor syndrome' is another potential block, casting self-doubt on whether one

measures up to others' expectations. Rooted in a fear of failure, it tends to be expressed in perfectionist behaviours.<sup>6</sup> An inability to let go of one's expertise (comfort zone) may also be a blocking factor in the transition to leadership positions.<sup>7</sup>

### **From specialist to generalist: key leadership transitions for managing businesses**

As they move up, people progress through different leadership tasks: managing self, managers, a function, a business, a group of businesses, and ultimately the enterprise. At each stage they acquire critical leadership skills. The shift from specialist to generalist, corresponding to the fourth stage (managing a business), requires leaders to acquire the following skills:<sup>8</sup>

- Developing and communicating a vision
- Developing a general manager perspective
- Working with peers
- Developing upwards relationships
- Creating outside networks

The move from specialist to generalist is the transition that is most difficult for women leaders to make, as evidenced by the small percentage of women leaders in executive roles.

### **Gender and leadership transitions**

In leadership roles, the dual challenge for women is “to balance the demand for agency required of the leader role and the demand for communion required of the female role”.<sup>9</sup> This double bind is also responsible for the differential image-management strategies men and women engage in.<sup>10</sup> For fear of coming across as too aggressive, women tend to engage in protective self-representation, for example by avoiding disapproval, lying low, and relying on data. Men use more acquisitive strategies such as actively soliciting approval, assertive attempts to signal their credibility, and relying on experience. In a similar vein, female leaders are more likely to choose “prevention” strategies - avoiding failure - over “promotion” strategies—actively driving for success and focusing on accomplishments.<sup>11</sup> An additional impediment to delegation – related to the sense of responsibility – is the often unconscious need to be protective of the team.

## METHOD

A qualitative methodology was used, focused on a thematic analysis of survey and interviews, with the following questions: (1) Is delegation seen as a bigger challenge for women than men? (2) Are the blocking factors different for women than for men? (3) How does effective delegation impact senior leadership transitions? (4) How do these leadership transitions help female leaders develop their “leadership identity” and to what extent does gender impact this?

The survey was administered to an expert group of 51 global executive coaches. On average they had 10 years coaching experience and worked with 54 coachees per year. In addition, in-depth semi-structured interviews were conducted with a sample of eight female leaders. The purpose was to further investigate how the two groups (high and low delegators) experienced the practice of delegation, potential blocking factors, the impact of gender on delegation capability, and the link between delegation and other senior leadership transitions.

## Key Findings and Discussion

Based on the surveys and interviews, a number of recurrent themes emerged:

**Delegation is a challenge for both male and female leaders, but their blocking factors are different.**

Survey and interview findings from coaches suggested that both men and women faced challenges with delegation; women had slightly greater difficulty than men. Half the executive coaches thought that men and women have similar challenges with delegation; 40% thought that female leaders have a bigger challenge, 8% that men have a bigger challenge. Factors that hinder delegation were very different for women and men. According to the survey, the blocking factors ranked as follows:

### ***For female leaders***

- Too-high sense of personal responsibility
- Perfectionism
- Fear of failure
- Feeling overly protective of the team

- Need for control
- Difficulty letting go of one's expertise
- Feeling "I can do it faster or better myself"
- Risk avoidance
- Conflict avoidance
- Low trust in the team

***For male leaders***

- Need for control
- Difficulty letting go of one's expertise
- Feeling "I can do it faster or better myself"
- Fear of failure
- Risk avoidance
- Low trust in the team
- Perfectionism
- Conflict avoidance
- Too-high sense of personal responsibility
- Feeling overly protective of team

The interviews confirmed to a high degree the first two blocking factors for female leaders. In particular, the very high sense of personal responsibility stood out as the major blocking factor for the female leaders who were weaker delegators.

Also surprising was that two of the top three blocking factors cited by female leaders - too-high sense of responsibility and feeling protective of the team - were ranked the lowest by male leaders. This would seem to confirm research findings on female leaders' tendency to favour prevention over promotion strategies, focusing on "what one ought to do" rather than on their own aspirations, advancement and accomplishments. Moreover, if women experience conflict between their gender and a leadership role, it would seem to confirm previous research on the motivation to lead: that is, that female leaders experience a leadership role in a normative way (as a duty and responsibility) rather than an effective way (the pleasure of leading).

### **Delegation is the key enabler for other leadership transitions, notably developing horizontal peer relationships**

In both surveys and interviews participants were asked to respond to what extent they agreed that effective delegation constituted a key enabler for other key leadership transitions for women. From the coaches' perspective, effective delegation has the strongest impact on the development of a general manager perspective and the development of horizontal relationships, followed by the development of a strategic vision and the development of an outside network.

When looking at the differential responses between male and female coaches: male coaches assigned a much greater impact to developing strategic vision (95%) than female coaches (73%), signalling that they think the "vision thing" is the most important dimension to invest in. For female coaches, the key leadership skill to invest in was a general manager perspective (97%) and developing an outside network (74%). Both female and male coaches ranked developing peer relationships as the second most important skill impacted by effective delegation. In addition, delegation was most strongly related to developing horizontal peer relationships and outside networking.

### **Time constitutes a key resource and time allocation a potential proxy for leadership transition "readiness"**

Another recurring theme in both surveys and interviews was time as a critical resource. As one coach noted: "Insufficient delegation holds leaders back from spending time on activities that they should be engaging in to create value. They need to let go of the operational tasks." In the interviews, time was linked to "mindspace" and "bandwidth"; others saw it as "time to negotiate more" and "time to engage in deeper conversations." As one female leader noted: "Each time I came back from maternity leave I saw the value of delegating. It released mind space for me and allowed me to become more strategic. It is the key to my progression." Another said: "The time gained by delegating enabled me to have deeper conversations with my peers. I benefited from those conversations because they had a major strategic and visionary orientation."

Another way to understand women leaders' transitioning capability is to look at the working time priorities they set for relationships. To gauge this, I asked each female leader interviewed to estimate what percentage of her total weekly working time she spent respectively with her direct reports, peers,

boss, network, and herself. I used the averages as an indicator of readiness for the transition to leadership.

Comparing “high” and “low” delegators, the low delegators spent on average 55% of their time with their direct reports. This compared to an average of 38% for high delegators, which confirmed my idea that time spent with one’s direct reports is a proxy for delegation ability; time spent with other actors (peers, boss, network) is an important leadership transition investment. Time spent on oneself, for reflection and planning, could also signal leadership maturity.

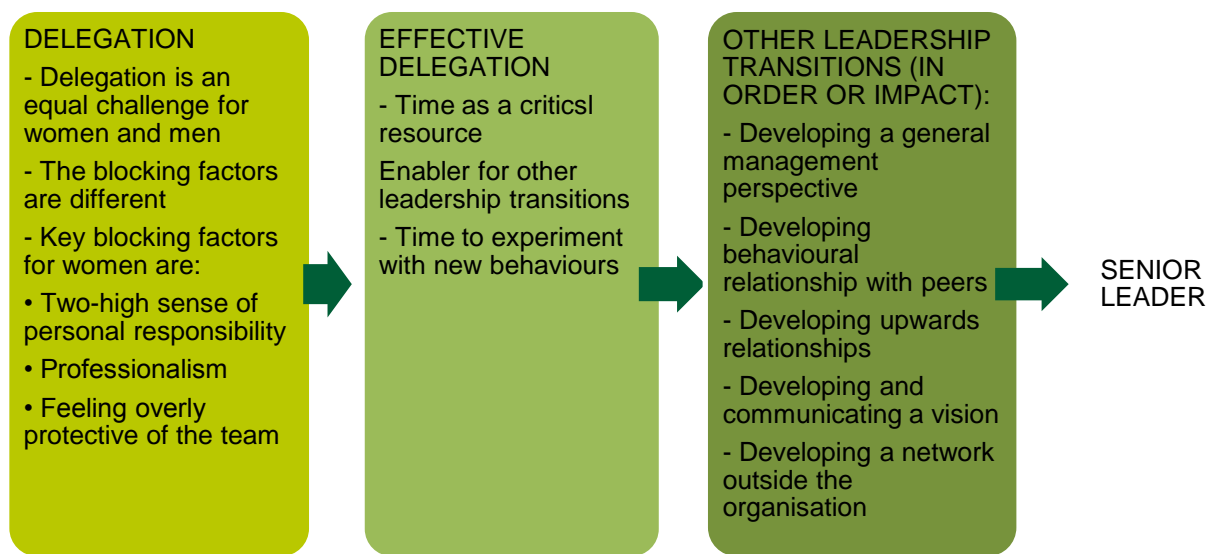
The need to devote more time to relationships other than direct reports was confirmed in the interviews, with one leader noting: “How I spend my time at work was probably the single most important realization for me. I used to spend 70% of my time with my direct reports. Now, I consciously try to reduce that while increasing the amount of external contact, networking and participating in industry forums, peer networks and the odd conference.”

### **Leadership transitions are intertwined with identity work**

The interviews also revealed how leadership transitions were intertwined with leadership identity work. One female leader reflected on how identity work ran in parallel with the transition to leadership: “Twenty years ago I realised that I could do a lot more through people than by myself, and that’s what drew me to leadership roles. But it was a transition: from working with just small groups of people or informal relationships, to now being head of large sub-groups in the organisation.”

Another shared how an executive development program triggered a change in the way she saw herself in her leadership role: “The course I followed was another tipping point for me because it created a transition space; it allowed me to stand back and see things differently. The phrase ‘What got you here won’t get you there’ forced me to think about what needed to be different. I am much more conscious now. I’m not sure if I’m better at delegating, but I’m much more conscious about the need to do it. I changed my image of how I should act in my role.”





### Leadership Identity Transitions

**Figure 1. Framework for delegation as a key enabler for leadership transitions**

### Practical Implications

The findings from the study suggest that delegation is a key enabler of leadership transitions, especially to higher echelons in the organisation. The time freed up (by delegating) can be directed to the development of other leadership skills needed for executive leadership. In practical terms, this means that women leaders should engage in *promotion* strategies rather than *prevention* strategies. Effective delegation opens the way to engage in more promotion strategies, such as developing and communicating a vision, developing a general management perspective, working on peer and superior relationships, and expanding their network outside, which all contribute to making them more “visible”.

Leaders and coaches should be aware of the challenges of delegation for individuals facing leadership transitions. The framework proposed and the blocking mechanisms described here can help coaches and individuals to pinpoint the barriers to effective delegation, and work on overcoming them.

## About the Author

Martine Van den Poel is a Leadership Development Practice Director and Executive Coach at the INSEAD Global Leadership Centre since 2003. Prior to this she was a member of INSEAD's Executive Committee and Associate Dean for External Relations until 2002, and in charge of INSEAD's executive education department from 1995 to 2000. Her coaching practice concentrates on leadership transitions, emotional intelligence development and team dynamics. The development and advancement of senior female leaders in organisations constitutes a special interest. She holds an Executive Masters in Consulting and Coaching for Change from INSEAD, an MPA from Harvard Kennedy School of Government, and a MS in Political Science from the Catholic University of Louvain.

<sup>1</sup> Ibarra, H., Snook, S. and Guillen Ramo, L. (2010). "Identity-based Leader Development." In N. Nohria & R. Khurana (Eds.), *Handbook of Leadership Theory and Practice*. Boston, MA: Harvard Business School Press, pp. 657-678.

<sup>2</sup> Ibarra, H., Snook, S. and Guillen Ramo, L. (2010); Watkins, M.D. (2012). "How Managers Become Leaders", *Harvard Business Review*, 90 (6), 64-72.

<sup>3</sup> Charan, R., Drotter, S. and Noel, J. (2011). *The Leadership Pipeline: How to Build the Leadership-Powered Company* (2<sup>nd</sup> edition). San Francisco: Jossey-Bass.

<sup>4</sup> Yukl, G. and Fu, P.P. (1999). "Determinants of Delegation and Consultation by Managers", *Journal of Organisational Behaviour*, 20, 219–232.

<sup>5</sup> Kets de Vries, M.F.R. and Engellau, E. (2010). "A Clinical Approach to the Dynamics of Leadership and Executive Transformation". In N. Nohria and R. Khurana (Eds.), *Handbook of Leadership Theory and Practice*. Boston, MA: Harvard Business School Press, pp. 183–223.

<sup>6</sup> Kets de Vries, M.F.R. (2005). "The Dangers of Feeling Like a Fake", *Harvard Business Review*, 83 (9), 108–116.

<sup>7</sup> Hill, L.A. (2007). "Becoming the BOSS", *Harvard Business Review*, 85 (1), 48–56.

<sup>8</sup> Charan, R., Drotter, S. and Noel, J. (2011).

<sup>9</sup> Carli, L. L. and Eagly, A. H. (2011). "Gender and Leadership." In A. Bryman, D. Collison, K. Grint, B. Jackson and M. Uhl-Bien (Eds.), *The Sage Handbook of Leadership*. New York: SAGE Publications, pp. 103–117.

<sup>10</sup> Ibarra, H. and Petriglieri, J.L. (2008). "Impossible selves: Image Strategies and Identity threat in Professional Women's Career Transitions". INSEAD Working Paper, INSEAD.

<sup>11</sup> Ely, R.J. and Rhode, D.L. (2010). "Women and Leadership: Defining the Challenges". In N. Nohria & R. Khurana (Eds.), *Handbook of Leadership Theory and Practice*. Boston, MA: Harvard Business Publishing, pp. 377-410.

## Commentary on Part Five

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While individuals may feel their transition to be unique, others have made similar journeys before them, leaving traces of the strategies that guided them through the labyrinth. Indeed most of their stories are testimonials that can help future ‘travellers’, each containing actionable advice on what worked and what to avoid.

The impact of transitions and identity work in the workplace should not be underestimated by executive education and leadership development professionals/ consultants, who should heed the insights of these stories. Subtle below-the-surface dynamics are difficult to detect – in individuals and in organisations. Many people are uncomfortable with revealing the uncertain state of their inner life. Business schools, organisations and consultants can provide a safe space for such individuals to explore openly and without judgement the dilemmas and paradoxes they face, as well as to help them hone the skills to consciously create the space they need (through delegation) to focus on what they imagine themselves to be and how to get there.

### **What lessons can be drawn?**

The authors, both of whom have executive coaching experience, offer concrete solutions to facilitate identity work, transitions and career progress.

- Agnoletto recommends *coaching* to help leaders overcome the invisible barriers to advancement, since it can provide a safe transitional space to experiment, develop and integrate a better understanding of one’s leadership identity.
- Van den Poel focuses on the specific skill of *delegation* for leadership development, since it allows leaders to invest in vital tasks such as developing a general manager perspective and building a network.



PART SIX

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# ADOPTING AN INCLUSIVE, SYSTEMIC APPROACH

Part Six adopts a systemic and inclusive lens, looking beyond individual symptoms to examine what might be occurring at a systemic level to explore some of the dynamics in organisational life that are driving people crazy and/or out of the door.

Toya Lorch describes the dilemmas of modern career configurations and the way they affect family dynamics. In particular, she explores the mismatch between organisational structures and traditional work family roles. Increasingly, the role of an individual in a family is flexible and less likely to be demarcated by gender. Despite widespread changes in family dynamics, deeply ingrained biases persist. Most organisations still operate on the assumption that caregiving is for women, and breadwinning for men. Hence the sensation experienced by many working parents of being pulled in too many directions as they try to balance the tasks of both roles. The author presents a Coaching Roadmap to help professionals transform their individual career dilemmas into their families' adaptive challenge. The author has also identified 'Five Core Competencies' that are needed to support the process of exploring and implementing informed career decisions, laying out the foundation required to have a reasonable level of work-life fit.

Claire Pointing explores the systemic issues underlying the exodus of senior women from professional service organisations. Her premise is that this is not a gender issue but a symptom of the pervasive myth of the ideal worker (totally committed, available anytime/anywhere, with non-conflicting family demands). She argues that a demanding work culture that punishes any deviation from the norm is increasingly incompatible with the expectations and needs of women and men.

# From Individual Career Dilemma to a Family's Adaptive Challenge

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Toya Lorch

## The Starting Point

In my coaching practice, I noticed that when professionals have to make and implement career decisions, these tend to fall at one extreme of the professional/personal life interface spectrum. Some avoid the complexity of the situation, ignoring the link between their personal and professional lives; others are overwhelmed by that complexity as their personal and professional lives are completely intertwined. My role as a coach is to help clients frame, and act upon, their career dilemmas from a standpoint that will increase their chances of achieving simultaneous positive outcomes in both their personal and their professional lives. I created a roadmap to reframe career dilemmas as a family's adaptive challenge, and identified the competencies associated with this process.

## Idea In Brief

Whereas family dynamics have changed fundamentally, most organisations still operate as if caregiving and breadwinning are done by two different people, hence the sensation experienced by most professionals of being pulled in too many directions. This becomes more explicit and is intensified when the individual has to make important career decisions. This chapter presents a new approach to making informed career decisions and outlines the competencies required to guide individuals through the decision-making process. The main features of this approach are:

- Reframing a career dilemma as an adaptive challenge provides a chance to transform career decisions into opportunities to achieve better outcomes in both family and work domains.
- Creating a roadmap which lays out four key stages in the decision-making process: Diagnose the system, Mobilize the system, See yourself as a system, and Deploy yourself.

- A set of five key competencies associated with each phase of the decision-making process.

### **Idea In Practice**

The proposed roadmap may be used as a self-help tool by HR professionals, coaches, headhunters and therapists to assist professionals facing career decisions. It can support professionals in exploring and implementing novel family configurations, original career paths, and effective patchworks of domestic arrangements. Three coaching cases are presented to illustrate the application of the roadmap and the importance of each competency during career transitions.



## Introduction

Breadwinner and caregiver roles are no longer rigidly separated along gender lines. Men and women can and do fulfil both roles, making time a scarce commodity. The problem is that while their roles have changed in a short period of time, most organisations still operate as if caregiving and breadwinning were mutually exclusive to two different groups of people.

Approaching the world as separate spheres (occupational and domestic) is so ingrained that individuals rarely question how this perception influences their lives. In reality, spillovers occur between work and family. Emotions generated in one domain, be they negative (anxiety, frustration, stress) or positive (fulfilment, high self-esteem and happiness) are carried into the other, impacting both.

The pervasiveness of the 'separate spheres mindset' in management is criticized by developmental psychologist Robert Kegan, who observed: "People who write, teach and shape the discourse about management apparently don't read the literature on intimacy. The people who create the leadership literature do not read parenting literature. All these people are trained in different professions, each with distinct identities, models of analyses, heroes, heroines, and ways of framing the question that needs answering."<sup>1</sup> Framing the problem at hand with a broader perspective than their specific area of main expertise is a challenge for most management experts, coaches and therapists.

To transcend such a mindset, other perspectives are needed to broaden how we approach work and life challenges and priorities and thus make informed career decisions. David Whyte proposes a more integrated approach by using the metaphor of *the three marriages*, according to which individuals are simultaneously "married" (1) to their work, (2) to other people (family members, friends, community) and (3) to their identity. Neglecting any of them is to impoverish them all. They are not actually separate commitments but different expressions of the way each individual belongs to the world.<sup>2</sup>

## Alternative perspectives

Work-life fit is a subjective, cognitive assessment by the individual and his/her family members of the degree of match or mismatch between the claims arising from the personal and professional domains and the resources

available to them to achieve a reasonable level of fit between work and family.<sup>3</sup> Work-life integration, therefore, concerns both the occupational and domestic spheres.<sup>4</sup> This dual agenda needs to meet the goals of both business productivity and employees' needs and concerns, and do so in ways that are equitable for both men and women.

Achieving work-life fit can be seen as an adaptive process, one that requires questioning the status quo, reviewing priorities, questioning beliefs, making tough choices, dealing with trade-offs, and substituting habits.<sup>5</sup> "The distinctive aspect of an adaptive challenge is that individuals must reconnect with values, beliefs and anxieties of the people that are going to be affected by the adaptive challenge."<sup>6</sup> By extension, career decisions can be considered alongside family issues as part of a global family adaptive challenge.

To summarize, framing career decisions as a family adaptive challenge helps facilitate the process, since family's needs are taken into account. If an individual decides to face his or her professional dilemma alone, family dynamics may remain static (not adapting) or respond negatively to the changes (resisting or even sabotaging the implementation of the decision).

## **METHOD**

Five competencies were identified as being fundamental to making and implementing informed career decisions considering the dual impact of the decision on family dynamics and career progression, taking into account the individual's life stage and its influence on the decision-making process. The concepts of work-life fit, work-life integration and adaptive challenge were used to develop a road map to help individuals to respond appropriately to the demands for change in their professional and/or personal domain.

## **Keys Findings and Discussion**

### **Core Competencies**

Five core competencies allow individuals to transform their individual career dilemmas into a family adaptive challenge, and therefore achieve better outcomes in their personal and professional lives.

*Self-awareness* is the conscious knowledge of one's own character, feelings, motives and desires. It also encompasses the awareness of how one's personal characteristics impact others. Self-aware adults can make informed decisions, relate to other individuals without projecting unsolved issues onto them, are responsible for their actions, cope with less-than-ideal realities, and go after what is really important to them.

*Identity management* involves the continuous management of one's personal identity, social identity and multiple sub-identities. Personal identity refers to the one's self-image, and is unique to an individual. Social identity is the identity that one derives from being a member of a specific group (e.g. nationality, gender). Multiple sub-identities are based on the different roles played by an individual (e.g. mother/father, worker, community member). Work-life integration depends on the ability to reconcile different roles and identities, particularly the individual's ability to negotiate role expectations with the self and others.

*Gender flexibility* is the openness to cross gender boundaries in order to create more flexible and egalitarian partnerships. It requires the revision of stereotyped gender expectations and concepts of the ideal worker and caregiver. Implementing innovative patchworks of domestic arrangements and applying new career templates requires flexibility in order to diminish 'equity' issues for men at home and for women in the workplace.

*Border management* involves the separation between work and personal life domains. The level of work-life integration or differentiation depends on negotiations between the border manager and his or her border keepers (family members, bosses). The boundary manager has to negotiate, improvise and experiment with different border configurations in order to solve role conflicts.

*Resilience* is the final competency. In times of professional and family uncertainty, plans fail, values may be questioned, and relationships can be at stake. During such periods, it is important to search for meaning by creating bridges from present-day difficulties to a potentially better future. The willingness to search for meaning enables the individual to face reality instead of slipping into impulsive action, negativity or denial. Resilient people have the ability to improvise with whatever is at hand.<sup>7</sup>

## Family's Adaptive Challenge Road Map

Informed career decisions are based on the main parameters of the work-fit and work-life integration concepts (above) and the ability to:

- Respond appropriately to the demands for change arising from the individual's professional and/or personal domain.
- Consider the impact that the decision will have on family dynamics and on career development, and how this impacts the decision-making process.
- Take into account the individual's life stage and how it impacts the decision-making process.

The family moves through a four-phase process to address adaptive challenges.<sup>8</sup> Because informed career decisions can take many forms, ranging from smaller moves, such as accepting or turning down a promotion or scaling back on work, to major career changes that can take two to three years, the process is constructed without a rigid time frame and the duration of each phase varies.

### Phase 1: Diagnose the system

The first stage involves gaining a distanced perspective from what is taking place in front of the observer's eyes. The key competencies in this stage are self-awareness and resilience. The work to be done is a higher-level assessment of the individual and his or her career and family dynamics, to gain a clear picture of the family's adaptive challenge. Diagnosis is conducted at three levels: individual, family and the interface between work and family.

*Individual assessment* involves understanding one's background and how this influences life choices; clarifying values; exploring personal passions and interests; preferred life style; life goals and personal vision. It also involves compiling an inventory of individual professional skills and competencies and career perspectives. The *family assessment* takes into consideration the family's life stage (transition to parenthood, pre-school age child, school age child, adolescent child and empty nest, caring for the elderly) in order to create and implement new patchworks of domestic arrangements and adaptive strategies. Finally, it is important to assess how the individuals are managing the *interface* between work and family. This provides useful information about how individuals are managing the borders between their work and family priorities and needs.

## **Phase 2: Mobilize the system**

Adaptive interventions are focused on a long-term solution rather than a quick fix. This requires framing the current realities as challenges and making those impacted by the changes feel uncomfortable. Psychological discomfort is used to drive progress and to avoid the risk of regressing to a more comfortable status quo. Key competencies in this stage are resilience, gender flexibility and boundary management.

The family facing an adaptive challenge should avoid explaining problematic realities through default interpretations or rationalizations that shield them from the need to change. In order to change, the family has to shift the way they approach reality and communicate in ways that allow conflicts to emerge, losses to be negotiated, and mutual support to be given. Also, by making systemic interpretations, each family member can think politically, map family members' concerns and desires, and spot opportunities for alliances. Because at this stage the family is starting to embark on the adaptive challenge, members will be more open to explore career options. However, it is also a time of potential conflict, and this has to be carefully managed rather than ignored.

## **Phase 3: See yourself as a system**

This third phase of the process is about assessing the characteristics (personality, experiences, emotional make-up) of the principal actor of the adaptive challenge. The previous phase opened up many possibilities in the domestic and professional domains, which now have to be narrowed down. Even though this is a family adaptive challenge, this is the time to resituate the individual in the challenge by identifying personal characteristics that can hinder or facilitate the required change. Key competencies in this phase are identity management and self-awareness.

In this phase, it is useful to look for deeper thoughts that might be related to the individual's potential resistance to change. It is recommended to explore what success means to the individual, what are the "many colours of success" in eight major categories: family, wealth, work/career, recognition/fame power, winning overcoming challenges, friendships and meaning.<sup>9</sup> Experiences and definitions of success differ from person to person, as the meaning of success is derived from intrinsic, internal validation as well as external validation. Assessing how and when an individual experiences success provides motivation and parameters for future career decisions.

#### **Phase 4: Deploy yourself**

The duration of this phase depends on the level of complexity of the career decision. As previously mentioned, career decisions can range from scaling back work in a current job, to changes that can take years to be completed. Key competencies in this phase are resilience and identity management.

During this phase, the recommendation is to remain connected to the family's purpose by understanding the context in which the decision is being made and by creating shared meaning for the decisions. Why and how decisions are made actually matters more than the outcome of the decision. The last part of the family adaptive challenge process is to run experiments in the domestic and occupational spheres. The concept of job crafting - experimenting with ways to meet various needs by redrawing boundaries or roles - can be applied in the occupational and domestic spheres.

### **Practical Implications**

The following case studies show how the roadmap may be used in practice. The four phases of the family adaptive challenge cannot be separated—each naturally merges into the next. These stories illustrate that the degree of complexity of the situation, the level of emotional proficiency, and the level of resistance to change will vary throughout the process. The cases are described as a fluid coaching process and information is organised according to the three parameters that support informed career decisions.

#### **Case study 1**

Mr. S. was 56, married, with a teenage daughter. He was unexpectedly fired from his position as vice president of a large bank. He was initially reluctant to acknowledge how this event had impacted his self-esteem and his drive to explore different career opportunities. During the coaching process he explored the possibilities of looking for another “24x7 traditional job”, establishing an investment office with partners, or moving his family to Europe to fulfil his desire to live abroad and live off his investments. Although he had already achieved financial independence, he had an unconscious need to punish himself for the unexpected dismissal, and this complicated the decision process.

#### ***Intervention***

Mr. S. considered himself a very rational individual. In this case, the most underdeveloped competencies were self-awareness and resilience. The coach and Mr. S. worked hard to access and work through feelings (e.g.,

anger towards his previous employer, low self-esteem, fear of having another career setback, guilt of being fired) that were preventing him from making an informed career decision. This episode required him to face reality not only from his usual rational perspective (e.g., discuss the financial implications with his family and explore professional opportunities) but also to kick-off the process of creating a new meaning for his life. The first step in this direction was to help him redeem himself from the abrupt way this professional cycle had ended, which was different from what he had *expected*.

***Results: What the client perceived as most relevant***

According to the client, the coaching process using the road map helped him: he worked through difficult emotions that could have negatively impacted future decisions; it provided a good balance between acknowledging the past and hoping for a better future; it made him feel “normal” because he acknowledged that what happened to him could have happened to anyone; it prevented him from taking an impulsive decision (his natural tendency); it expanded his ability to spot alternatives that he wouldn’t have recognized without being open to possible new professional identities; and it allowed him to have more transparent conversations with his wife and daughter and take their perspectives into consideration. By the end of the process, he had decided to stay in his country and begin exploring potential partnerships to create a private investment firm.

**Case study 2**

Mrs. B. was 44, and a director in a consumer goods multinational. She was married with two young sons. Her life was disrupted when her husband, an entrepreneur, went bankrupt. The bankruptcy forced her to become the main breadwinner for the first time in her life. She therefore had to make choices based on assuring their financial stability.

***Intervention***

Mrs. B. felt pressured by the financial situation, and unsure about her capacity to fulfil the role of breadwinner. In this case, the competencies to be developed were identity management and gender flexibility. The first challenge was to be able to mourn an outdated work identity. The second challenge was to experiment with the role of breadwinner. Once she could embody the role of breadwinner, she would be able to create a new working identity.



***Results: What the client perceived as most relevant***

According to the client, the coaching process allowed her to make a clear distinction between personal and professional problems; establish a link between them; to identify her deepest motivation at work; create a structured process that allowed her to experiment with the role of breadwinner; and gave her new motivation to perform at work.

**Case study 3**

Mr. P. was 40, married with one child. During a period when he was CEO of a mid-sized company, he found himself in a critical situation. The company was about to be sold and, at the same time, he was going through a marital crisis. Due to the complexity of the situation, the intervention focus was not on making a career decision but on managing a generalized crisis that could impact both the personal and professional domains interchangeably. What was most disturbing to Mr. P. was that he could neither predict nor control the outcomes of either crisis.

***Intervention***

The first competence to be developed was self-awareness. The client had to access how his ambivalence, anxiety and impulsiveness were impacting his interpretation of the situation. A key insight for him was that these feelings were present in his private and professional life, although they were expressed differently in each domain. Once he understood how entangled both domains were, we could address the need for the second competence, border management. The aim was to help him minimize the impacts of negative spillovers in both directions (from work to personal and from personal to work).

***Results: What the client perceived as most relevant***

According to the client, the coaching process prevented him from making impulsive decisions (to split up from his wife and resign at the same time); he became aware that his focus was more on *running away from something rather than running towards something*, which could be a dangerous strategy at this point in his life (he realised that he was going through a midlife crisis). I spoke with Mr P. six months after we finished the coaching process and he was happy to be still working at the same company and conducting the merger with another company. He had decided to split up from his wife right after we finished the coaching process.

**Conclusions**



Most people face several career dilemmas during their working life and have to negotiate between professional and personal demands. Two common questions help to frame career decisions: “Do I live to work, or work to live?”; and “If I had only two years to live, how would I like to spend my time?” These highlight the importance and intensity of reviewing aspirations, possibilities, limitations and values. By developing the competencies described above, individuals can explore and implement novel family configurations, original career paths, and effective patchworks of domestic arrangements. By following the road map described in this chapter, family needs are taken into account and outcomes are more likely to be positive and sustainable for all concerned.

Organisations will benefit from framing the challenges through the lens of a dual agenda, in which work effectiveness and quality of life are perceived as complementary, not binary. Informed career decisions reinforce the dual agenda because professionals feel more responsible for and in control of their decisions, and this boosts their performance and commitment at work.

### **About the Author**

Born and raised in Brazil, Toya Lorch began her career as an occupational therapist specializing in mental health. After career counselling in 1995, she decided to start a new career in human resources. She started her "second career" with Ryder Logistics where she worked as an HR Business Partner. Next, she worked at Unilever's International Training Centre in London as an Internal Coach. During this period she obtained a degree in Consultation and The Organisation: Psychoanalytical Approaches, from the Tavistock Clinic in London. Since 2003, Toya has been working in Brazil as a professional coach and organisational consultant. Together with Mônica Fix, she is the founding partner of Kampas Coaching & Consultoria in São Paulo. Toya holds an Executive Masters in Consulting and Coaching for Change from INSEAD.

<sup>1</sup> Kegan, R. (1994). *In Over Our Heads: The Mental Demands of Modern Life*. Cambridge, Mass: Harvard University Press.

<sup>2</sup> Whyte, D. (2009). *The Three Marriages: Reimagining Work, Self and Relationship*. New York, NY: Penguin Group.

<sup>4</sup> Bailyn, L. and Fletcher K. (2002). "Work Redesign: Theory, Practice and Possibility", Working paper from the MIT Workplace Centre.

<sup>5</sup> Heifetz, R. A., Grashow, A. and Linsky, M. (2009). *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organisation and the World*. Boston, Mass: Harvard Business Press.

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<sup>7</sup> Coutu, D. (2002). "How Resilience Works", *Harvard Business Review*, 80 (5), 46-51.

<sup>8</sup> Heifetz, R. A., Grashow, A. and Linsky, M. (2009).

<sup>9</sup> Kets de Vries, M.F.R. (2006). *The Leadership Mystique: Leading Behaviour in the Human Enterprise*. Harlow, England: Prentice Hall/Financial Times.

# It's the System, Stupid: The Exodus of Talent from Elite Professional Service Firms

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Claire Pointing

## The Starting Point

The gender debate is becoming a distraction in the war for talent in elite professional service firms (PSFs). The focus on gender has blinded us to a deeper issue: valuable *women and men* are increasingly rejecting PSFs careers and the unspoken rules underpinning them, notably the intense workload required to succeed professionally and financially. Many of the best and brightest are taking stock and saying “No thanks.” New research indicates that far from this being a gender problem, women are in fact savvy “early movers”, rejecting the intensive, unsustainable work practices and identity of the traditional PSF career. Indeed when talented high-performers begin rejecting career options across top PSFs, it's time to stop casting women as a problem and focus on the underlying drivers of industry-wide talent retention patterns.

Are we brave enough to look beyond surface-level symptoms and ask “What is really going on here?” This is a real and present issue—many firms talk about the need to work in new and more flexible ways. Yet despite their good intentions, attempts to create “parallel” career paths offer only a “career consolation prize” rather than genuinely respected and rewarded alternatives. Ultimately it is not about gender. Too many smart people - regardless of their chromosomes, class or colour - are opting out of traditional career path in favour of futures that are not regarded as “second best”.

## Idea in Brief

From my extensive research, including 36 in-depth interviews, a pattern emerges that does not fit the gender and diversity narrative: men as well as women struggle with the demands of the professional service world.

- There is a *system-wide working identity* in PSFs that demands extreme commitment in exchange for the potential rewards of partnership. These demands transcend organisations, and are unconsciously accepted and internalized by individuals, perpetuating an inflexible and hidden set of workplace expectations.
- *The illusion of conformity* is more important than genuine commitment—any sign of deviation from the required working identity is unconsciously punished by both individuals and organisations.
- This systemic working identity presents individuals with a *rigid binary career choice*—conform or quit: for most, any “middle way” comes at the price of a loss of financial reward and professional downgrade to “also ran” status.

## Idea in Practice

Organisations and individuals in the elite PSF world are increasingly aware that its uniform, intense working environment is seen by many as unsustainable and is a root cause of talent retention issues. Part of the problem is that talent retention has been framed as a gender and diversity issue, with a focus on fixing women. But women have been remarkably resistant to being “fixed” and even less willing to “conform” to industry-wide ways of working; they often leave PSFs for alternative career paths.

Faced with an increasingly competitive working environment post-2008, more men are also choosing to quit rather than conform. Far from being a problem, women were in fact first-movers in rejecting an inflexible systemic identity that is no longer fit for purpose. Rather than fight the system, the good guys are also following the good girls out the door.

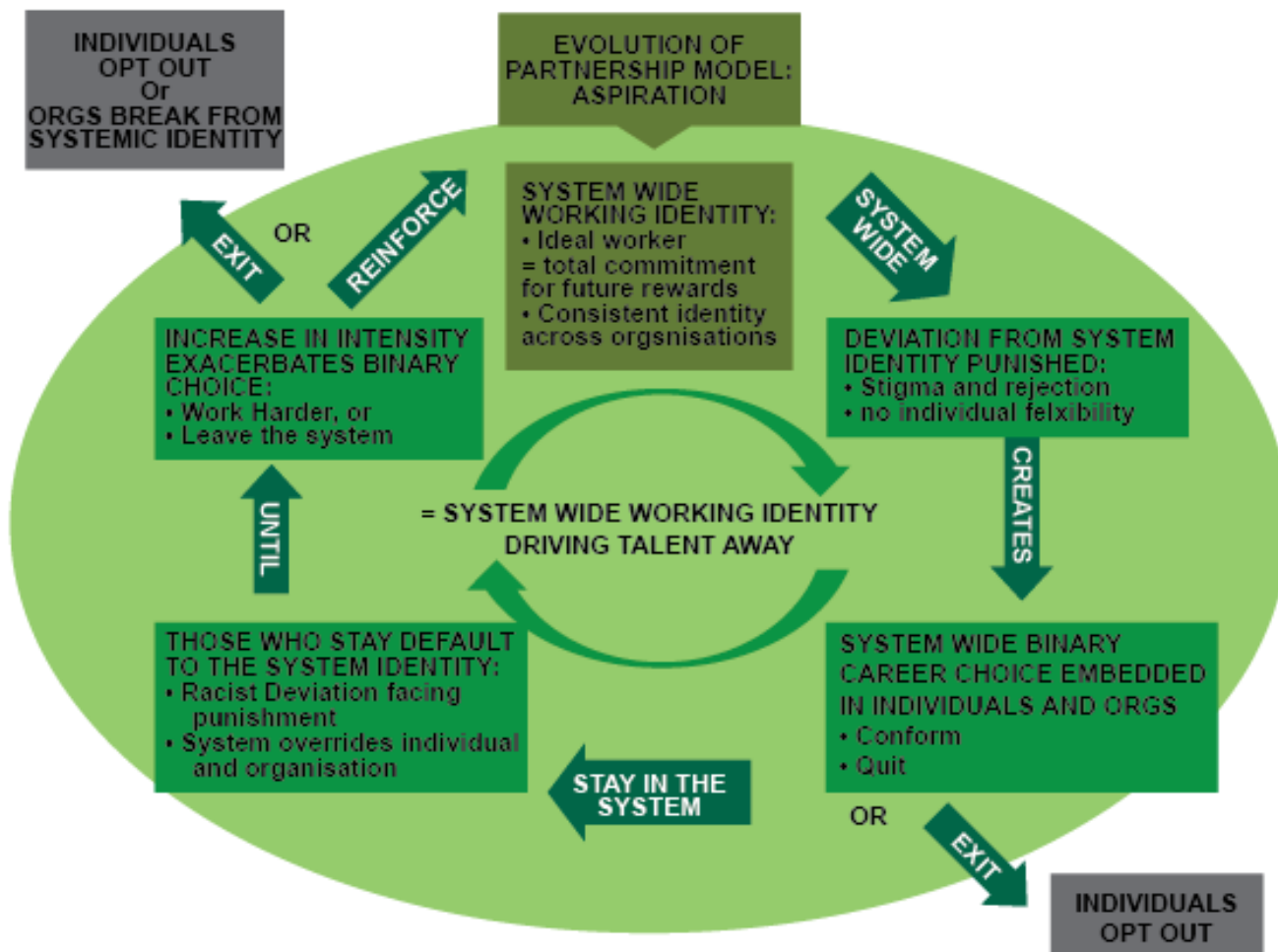
## Introduction

*“Our Age of Anxiety is, in great part, the result of trying to do today’s job with yesterday’s tools and yesterday’s concepts.”—Marshall McLuhan*

Too many good people - men and women; young and old - are choosing to leave elite professional service firms. Many are cutting short their careers in the PSF industry specifically because they reject historically embedded assumptions about how an individual must work within a PSF organisation to be “successful”.

It is still broadly accepted that to be successful within the elite PSF world, men and women must be seen to be “ideal workers”<sup>1</sup> who are totally committed to their career. This becomes their default setting.<sup>2</sup> It involves a binary career choice—conform or quit. Because this default setting is seen as acceptable on the surface, individuals often resist attempts by organisations to implement less intense ways of working such as flexible working. So even though these embedded assumptions seem to be increasingly misaligned with the career choices of talented professionals, they are so entrenched that they perpetuate systemic norms at an unconscious level.

Interestingly, for much of the last 20 years, talent retention in elite PSFs has been primarily framed as a gender issue.<sup>3</sup> Although entries into the PSF industry over the last 25 years have largely reflected gender parity, successful women have left the elite PSF industry in far greater numbers than men.<sup>4</sup> Despite 20 years of taskforces and diversity initiatives, many women have stubbornly resisted being “fixed”<sup>5</sup> and have “opted out” instead.<sup>6</sup>



**Figure 1. Process model of system wide working identity in PSFs**

By casting talent retention as a gender issue, diversity initiatives have ignored the elephant in the room—inside each and every individual, regardless of gender, is a systemic identity that drives how people believe they should work. Any organisation-level initiative to implement alternative ways of working is only likely to succeed if it directly challenges and supports deviation from the “ideal worker” bias.

## METHOD

A total of 36 interviews were conducted in eight organisations, being a mix of global law, accounting and consulting firms. Each firm had between 100 and 3,000 partners and had been in existence, in some form, for at least 70 years. The selection criteria for the interviewees deliberately focused on meeting with individuals at varying levels of seniority. The final group included five senior managing partners, 14 equity partners, five former equity partners, six salaried partner/directors and six manager/associates. All eight firms requested anonymity—PSF organisations appear to be particularly sensitive to public scrutiny.<sup>7</sup>

Adopting a grounded theory approach, a mix of qualitative data sources including semi-structured interviews, documentary data sources and extensive literature reviews were used. From these I developed a theoretical framework that demonstrates that the historic and inflexible expected ways of working in the elite PSF world are unconsciously driving individuals' career decisions.

## Key Findings and Discussion

### Professional service firms: a historic culture of total commitment

[Equity Partner] “Working hard is seen as a badge of devotion—this is due to natural highs and insecurity plus it is a function of high achieving, ambitious and competitive people.”

The working culture and habits of individuals within the PSF industry can be traced to a set of historic industry-wide assumptions, the central one being that individuals are submitted to “extreme working conditions”<sup>8</sup> in exchange for the possible future reward of partnership.<sup>9</sup> In the words of Bob Moritz, U.S. Chairman of PwC: “Built into this model was another key [historical] assumption: that our workforce accepted the notion of making partner as the reward and justification for years of long hours in service to our clients.”<sup>10</sup>

The elite PSF model has its roots in the partnership model of the late 19th century,<sup>11</sup> when businesses were built on the foundation of small, unlimited liability partnerships; whoever was admitted to the partnership bore an associated risk that if an individual made a mistake, all the other partners would be personally liable.<sup>12</sup> An error by someone else in your firm could cost you your house.

However, with risks came rewards—making partner meant wealth and professional security.<sup>13</sup> The potential partner (until the 1970s almost always a man) would have to demonstrate total commitment to the firm, but the long-term rewards were worth the effort.<sup>14</sup> Aspiring to the rewards and status of partnership has been at the heart of PSF culture for over 100 years.<sup>15</sup>

Today's global PSF business model still strongly equates success with the rewards of becoming a partner.<sup>16</sup> The reward structure is predominantly an “up or out” culture, with success based on the “winner takes all” model: those who achieve equity partnership receive disproportionate rewards to those who do not;<sup>17</sup> those who do not make partnership or leave the system are seen as having failed. In the words of one partner I spoke with: “People who leave just weren't good enough to be a partner here.”

### **A system-wide all-or-nothing identity embeds “total commitment”**

[Senior Associate] “To become a partner you need to be a ‘universal soldier’—this is explained by one of the board members. A universal soldier is an excellent generalist with total commitment.”

Over 100 years of collective behaviour – adopting intense working practices in aspiration of the prize of partnership – has led to an industry-wide culture: the ideal worker in the PSF must commit to an all-or-nothing workplace and an all-or-nothing identity.<sup>18</sup>

Because the aspiration to become a partner and reap the associated rewards has historically been at the heart of the “imagined future self”<sup>19</sup> of the young professional service employee, the ideal worker<sup>20</sup> has taken on an extreme identity in the PSF world. These organisations are predicated on the assumption that the “ideal worker” has no life beyond work: “Work must come first, and all organisational demands must be met. This definition of ‘ideal worker’ makes consideration of employees’ lives outside of work off limits... Another part is the managerial assumption that all employees are motivated by the desire to move up into and through the managerial hierarchy.”<sup>21</sup>

This all-or-nothing identity can be seen as a powerful, industry-wide stereotype. “Culture recreates itself: One way that stereotypes bind our behaviour is by constraining where we feel we belong and whom we can become.”<sup>22</sup>

### **Applying a psychodynamic lens to the elite PSF world**

Applying a systems psychodynamic approach to this phenomenon of system-wide conformity to an all-or-nothing identity helps to “shed light on repetitive,



intractable behaviours; challenge the persistence of old ideas; and identify deceptions, or omissions in consciousness, perceptions, or ideas that have been edited out of conscious thought.”<sup>23</sup> By applying such a perspective, and looking beneath the surface, I found that the professional demands on individuals are not exclusively located within specific organisations or individuals, but are woven into the fabric of the wider PSF system.<sup>24</sup>

### **The power of the “associative unconscious” on an “unconscious community”**

To demonstrate how smart, highly educated individuals can be unconsciously aligning to a single, industry-wide working identity, I adopted Long and Harney’s concept of the “associative unconscious” where “thought is a social rather than an individual process” and that individuals are part of a “broader systemic process.”<sup>25</sup> The power of the associative unconscious is that it can override the individual’s autonomy in otherwise adopting behaviours that deviate from the “unconscious community” that is the global PSF system.

If we recognize that individuals within a given system - such as the PSF world - are part of an unconscious community, then a system-wide working identity can inhabit everyone within that system as a function of the system-wide “associative unconscious”. This helps to explain why it is so hard to get rational, intelligent individuals to deviate from an historic but outdated working culture: the individual will resist any change that deviates from the beliefs of the wider unconscious community—even when at a rational and conscious level they genuinely want to change.

### **The powerful systemic identity drives individuals’ behaviour and transcends organisations**

[Salaried Partner] “You are interchangeable and the firms are interchangeable.”

When Harvard Business School professor Leslie Perlow piloted a project to give consultants at the Boston Consulting Group (BCG) more control over their working lives by giving each member of a team a “predictable” night off a week, she hit a wall of resistance. This was curious, as staff survey data was clear that a significant number of individuals at BCG were looking to leave because of the lack of control over their lives.<sup>26</sup> Perlow met with the constant refrain from up and down the BCG hierarchy: “We have to always be on”, “It’s a 24/7 job” or “I can not possibly turn off; this is who I am.”

Even when the first pilot returned improved staff and client satisfaction reports, the resistance and responses of those invited to join the program persisted.

In another study, researchers were puzzled by the behaviour of individuals within a global consulting firm working in an environment where “what they experience as extreme work conditions, in particular long working hours, and yet they subject themselves willingly. They do not engage in protest, sabotage or other forms of resistance and there are very few visible signs of resistance to the prescribed subjectivity.”<sup>27</sup>

### **However perception trumps reality—perceived deviation is punished**

[Associate]: “Perception is important; by going home to put the children to bed I am failing to give the perception of commitment, even though I deliver on my work and have great client relationships.”

Being fully committed is not enough to conform to the PSF “ideal worker”—rather than being committed to satisfy the all-or-nothing demands, the ideal worker must be seen to be committed. To succeed and survive they must be seen to be on “24/7” and to be working outside of “normal work hours”—termed “extracurricular facetime”.<sup>28</sup> If an individual is not seen to be delivering extracurricular facetime - even if they are in reality fully committed - they will be viewed as neither dependable nor committed. Conversely, those who create the illusion of being fully committed – even where they consciously “slack off” – are rewarded for their perceived commitment, as exposed in a blog and article on “Why some men pretend to work 80-hour weeks.”<sup>29</sup>

The systemic working identity is so embedded that the illusion of conformity has become even more important than genuine commitment. On one level this is a gender issue as the perception of non-conformity due to family commitments creates the impression of deviation and is unconsciously punished by both individuals and organisations. Female interviewees reported that their physical absence from the office created a perception of lack of total commitment, which was demonstrably not true in terms of hours billed and client satisfaction.

### **Individual deviation is not an option: stigma reinforces the system wide all-or-nothing identity**

[Salaried Partner] “The approach to individuals outside the current partner group is ‘out of sight—out of mind.’”

So why do individuals and organisations not create more appropriate ways of working within the PSF system? Even clever “slacking off” is still conforming to the perception of the ideal worker identity. Why do they maintain that the only way to have a “successful” career in a PSF is to be seen to comply with the demands of an all-or-nothing identity (and be perceived) to be totally committed to the exclusion of other facets of their life?<sup>30</sup>

The answer lies, in part, in understanding that it is not about individual choice. The hidden power of the associative unconscious influences all of the individuals within the system—the “whole network is supra-individual.”<sup>31</sup> Any perceived lack of total commitment creates a false perception of “flexible” working<sup>32</sup> that puts the individuals in direct conflict with the demanded all-or-nothing identity.

Extensive research demonstrates that deviating from expected “social norms” leads to stigmatization on many levels.<sup>33</sup> The documented reality is that within the elite PSF world, any perceived deviation from system-wide norms results in both conscious and unconscious stigmatization of the deviating individual: “There are both explicit and implicit beliefs in law firms that the best lawyers don’t have lives... [A colleague] was told gratuitously in an elevator by a partner that she could not be serious about her work because she worked part time” and “The institutional perception of part time as bad can’t be battled via policy—it is a mindset.”<sup>34</sup>

The power of the systemic working identity is so strong that frequently when an individual deviates from it, they believe that they are not entitled to expect success within their professional space because they have stepped away from the norms of extreme professional commitment.

### **Exposing a binary career choice: the system is stronger than the individual**

[Ex-equity partner]: Question: “Why did you stop being a partner?” Answer: “Because it was impossible.”

Longitudinal economic research clearly shows that deviating from the expected all-or-nothing identity in the elite PSF world results in disproportionate professional and financial punishment. Deviating has a significant impact on the individual, translating into disproportionate differences in pay.<sup>35</sup> The all-or-nothing identity in “high status” professions such as elite PSFs, creates an environment where individuals are faced with “an all-or-nothing commitment, leaving them with the stark all-or-nothing

decision either to work full time in jobs that typically demanded a 60–80 hour working week or to leave.”<sup>36</sup>

This “non-linear” impact of attempting to work in a way that deviates from the ideal worker stereotype has created a deeply embedded set of working practices across the elite PSF industry. Anyone who will not, or cannot, conform to the systemic identity is devalued financially and professionally as a result of system wide-stigma. The inflexible systemic working identity has created a powerful binary career choice—individuals can either conform or quit, but cannot choose a “middle way” without the explicit support of those around them.

### **The gender story in response to “conform or quit”**

[Ex partner]: Question: *“Why did you stop being a partner?”* Answer: *Her first response was “I wanted to spend time with my children” but when challenged on this, she replied, “Because being a partner was impossible. It was ridiculous hours, too much pressure, boring, and there were too many men.”*

[Associate]: *“Being exhausted is the only impediment—I don’t want to make a choice (between family and work) I should be able to balance. You have to want it enough to progress.”*

Flexible working - a deviation from the systemic ideal worker - has persistently been characterized a women’s issue.<sup>37</sup> The focus has been on gender initiatives with a hidden subtext that if women cannot “lean in”<sup>38</sup> to the winner-takes-all system, why should they be rewarded?

Women, as a group, appear to have been more likely to “quit” rather than “conform” in response to the binary career choice presented by the system wide all-or-nothing identity—they appear to have been less inclined to trade total commitment today for the “imagined” future prize of partnership.<sup>39</sup> This phenomenon of women “opting out” has been the subject of research over the last decade, again through the gender lens.<sup>40</sup>

What is curious is that women in the PSF world start out as ambitious as men.<sup>41</sup> These are women who have attended elite universities, joined elite firms in equal numbers to men, and have started out with similar levels of drive and ambition.<sup>42</sup> But there is a surprising pattern.<sup>43</sup> Women who have left high-intensity environments have frequently used the work/family conflict as an explanation for leaving their chosen career path. When challenged on this, many women confessed that they left because they were not prepared to

work at the levels of intensity demanded. The lure of partnership did not merit the all-or-nothing commitment they were asked to make in exchange.

This supports the hypothesis that an unsustainable or unwanted working environment leads to the individual being faced with an “impossible self”. For many women in the PSF world, conforming to the commitment/reward model underpinning the all-or-nothing identity has presented them with an impossible self, which leads to a rejection not just of the firm but the elite PSF world.<sup>44</sup>

If the issue of women leaving the PSF world is reframed not as a gender issue but as a response to individuals deviating from an inflexible systemic working identity, the failure of two decades of gender-focused taskforces becomes less bewildering: their focus has been on the symptom rather than the root cause. However, the next question must be what happens if men deviate from the all-or-nothing working identity? A number of men manage the perception of their total commitment by creating an illusion of total commitment, but what if men want to visibly work in less intense ways without gaming the system?

### **The stigma for deviating is not gender blind—men are also affected**

It turns out that the focus on gender as the driver of flexible working initiatives is ignoring what men actually want. In MCA research in 2012, young consultants (regardless of gender) cited work-life balance as the main reason for considering leaving management consulting in the next five years. Increasingly, graduates and younger workers are looking for flexible working and good work/life balance. In exploring the woeful retention of women at a global consulting firm, it turned out that men as well as women were struggling with the “always on” demands of the work environment.<sup>45</sup> Clearly, not all men accept the demands of the all-or-nothing workplace.

The question then is: What happens to men who look for an identity that deviates from the stereotype? In addition to the “flexibility stigma” for deviating from the all-or-nothing stereotype, men also attract a “femininity stigma” because they are perceived to be acting like women.<sup>46</sup> A clear example of this was seen in the summer of 2014, when a male senior partner at a large London law firm chose to go part-time to spend more time with his children. In an article in the *Sunday Times*, entitled “Power to the Part Timers”, his new working arrangements are outlined along with the family narrative that had supported his decision. Interestingly, this article did not appear in the Business section or even the News Review section. The man who publicly deviated from the system stereotype was the focus of an article in the Women’s Style section, following an article on “Why French women don’t get fat.”<sup>47</sup>

Men not only attract extra stigma if they try to deviate from the all-or-nothing working identity, they are unable to use the excuse of the “work-family narrative” to mask their escape from the demands of the system. At some point, however, if the aspiration to be part of the PSF system is no longer sufficient reward for the “extreme” demands of the PSF world, men will find that the inflexible system it imposes may present them with an “impossible self”, hence quitting will increasingly become a more viable career option than conforming.

## **Practical Implications**

Talent retention has been flagged by industry leaders as one of the biggest issues facing elite PSFs.<sup>48</sup> The old ways of working coupled with the impact of the post-2008 financial crisis have created a working environment where the rewards promised are no longer as certain or even desirable as they once were.<sup>49</sup> The prize of partnership is no longer a sufficiently juicy carrot to keep people committed,<sup>50</sup> hence new ways of working are at the heart of the war for talent in elite PSFs.

Faced with a binary career choice, more men are choosing to quit. Far from being a problem of gender, women are in fact first movers in rejecting an inflexible systemic identity that is no longer fit for purpose. When increasing numbers of men are becoming “regrettable losses”, it is time to question whether the system rather than gender is really the problem.

### **Exposing and addressing the systemic identity is at the heart of successful change.**

If organisations can recognize the hidden power of a systemic identity over individuals, change is more likely to be successful rather than “short-lived.”<sup>51</sup> But for this to happen, it will require a significant and conscious change in culture at the organisational level—individuals and teams cannot do it on their own.

First, organisations and individuals need to acknowledge the power of the systemic identity on the behaviour of individuals—the fact that the current way of working is based on a set of deeply embedded assumptions. Change requires consciously breaking away from the historic PSF model where extreme commitment is a *sine qua non* of a secure place in the partnership club. Second, the organisation and the individuals need to identify less intense ways of working, and support rather than stigmatize individuals who adopt this new identity.

In the teams in BCG, predictable time off (PTO) only worked when “not switching off” became an alternative source of deviation and stigma. What is interesting is that the success of PTO has been patchy—it has worked at a team level but not across the organisation. After three years, only 37% of BCG teams successfully applied PTO even though the economic and human benefits are clear and the organisation has rolled the program out as a firm-wide initiative.<sup>52</sup> I suggest the patchy success is, in part, because the power of the system working identity was not exposed and directly addressed as part of the PTO program—the consultants and partners keep unconsciously switching back to their all-or-nothing default settings.

Firms that have directly challenged the demands of the all-or-nothing working identity by consciously supporting (and even requiring) individuals to deviate from their systemic identity have been able to create genuinely desirable alternative career paths whilst staying within the traditional partnership model.<sup>53</sup>

Another recent example of a successful breakaway from the pull of the system are alternative PSF organisations such as talent-pool-based organisations like Edem McCullam<sup>54</sup> and Axiom where individuals can choose how much of their time they sell. The traditional “up or out model” has been replaced with a *talent pool model where labour is exchanged on a transactional basis*—these new providers sit outside the traditional global PSF system and provide a genuine alternative to the historic “conform or quit” binary career choice.

## Conclusions

My results are not about women. They are about individuals, the power of a system-wide identity, and the perverse impact of the binary career choice it offers, which is increasingly “gender blind”. Women may have been more sensitive to the demands of the system-wide identity, and faced - albeit unconsciously - with that binary choice have chosen to “opt out” rather than “lean in”, but choice of conforming or quitting presents itself to men, too. Men as well as women are responding to increased intensity in the post-2008 PSF world by looking to leave at all levels and in larger numbers. The theoretical model set out in this paper points to individuals responding to a particular intensity point at which they reject the systemic identity and walk away—this is already starting to happen in the associate ranks with “regrettable losses” increasing.



By highlighting a systemic identity as a driver of classic working behaviours, this research contributes to the wider literature on understanding behaviour within the PSF environment, and demonstrates that the systemic identity prevents individuals - regardless of gender - from having any meaningful control over their professional and personal identities.

I recognize that any deviation from the current all-or-nothing approach to work will require the conscious support of the current cohort of owner-partners. In many organisations, the group is focused on collecting their “winner takes all” rewards, with a primary focus on short-term profits and personal survival. Any change will require a potential shift in how much money the current partners can expect to make in the short term to secure long-term talent retention. Asking owner-partners to put securing the long-term viability of the business over the short-term rewards of individuals will be a real challenge unless the partners can be persuaded that long-term benefits are worth the short-time pain.

Change in the elite PSF world is neither easy nor quick—it has been compared to turning a “super tanker” (Lord Judge).<sup>55</sup> Now that the good guys are following the good girls and “opting out”, perhaps we will stop looking at women as a problem and listen to them telling us that structural change is necessary in the elite PSF industry if we are to retain the talent of the future.

### **About the Author**

Claire Pointing is an organisational consultant and executive coach who draws on over 20 years’ experience as a senior international finance lawyer, strategy consultant and senior public sector official. She has qualifications from a variety of institutions including Oxford University, London Business School and INSEAD. Her coaching and consulting work focuses on working with organisations and individuals to identify and resolve business effectiveness issues relating to organisational dynamics. Claire has had extensive international experience, living and working in London, Paris, New York and Athens and working in many EMEA countries, the USA, Singapore and Hong Kong.

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## Commentary on Part Six

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The final chapters focus on the broader question of what is happening in the organisational landscape as a whole. Why is organisational life so unstable? Why do people change careers so often – sometimes making dramatic changes which correspond to significant life events? What is that critical point where they decide to leave the organisation to seek out other opportunities?

There can be no doubt that what people expect from organisational life has changed. No longer do they envisage life-long employment with a single company. Personal and professional factors now influence the work (or not to work) equation. Lorch describes the dilemmas of modern career configurations and the way they affect family dynamics. Pointing frames the exodus of both men and women from professional services not as a gender issue but a systemic one, rooted in organisational expectations of an ideal worker as one of absolute commitment. Clearly, organisations have been slow to adapt to the changing aspirations of its members, and the result is constant tension between the different paradigms.

### **What lessons can be drawn?**

Taking a systemic view suggests that the actions taken can benefit all organisational members, not just a subgroup such as women, minority, LGBT, etc. It also means that initiatives are not confined to a specific group (as many diversity initiatives are wont to be) and thus lack “teeth”. A change agenda focused on systemic issues is more likely to resonate with and involve the general population.

- Pointing argues that a demanding work culture that punishes any deviation from the work norm is increasingly incompatible with the expectations and needs of women *and* men. If organisations want to retain a high-calibre workforce, they need to take an honest look at the implicit assumptions of their people as well as what they expect from the organisations they work for. A mutual discourse needs to take place if any meaningful change is to occur, to the benefit of both parties.
- Lorch provides a self-help tool that can be used by HR professionals, coaches, headhunters and therapists to assist professionals facing career decisions. The roadmap takes a dual approach, taking into

consideration professional aspirations as well as family configurations in order to generate original career paths that are satisfying both for individuals and those around them.

# CONCLUSION:

## DEVELOPING NIGHT VISION AND THE NIGHT VISION PARADIGM

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Erik van de Loo and Roger Lehman

The focus of our psychodynamic-systemic approach is to explore the multiple and ongoing, conscious and unconscious interactions between organisational and human complexity. This applies at all levels of interaction: individuals, teams, large groups, organisations and society. The premises of the psychodynamic-systemic approach are described in the introduction. In concluding this collection, we want to highlight three aspects essential for making it the cornerstone of a professional and academic discipline: the trinity of theory, technique and practice, the crucial role of self-as-instrument and the capacity for developing “night vision”.

### **The trinity of theory, technique and practice**

A structural approach of psychoanalysis as a scientific discipline<sup>1</sup> differentiates psychoanalysis in several ways: as a theory, as a technique, and as a practice. The theory of psychoanalysis focuses on the unconscious. The technique of psychoanalysis is about how to get access to, explore, and make sense of the unconscious, for example by free association and interpretation. The practice element refers to the application of aspects of the theory and technique for self-analysis and treatment of patients. The case studies published by Sigmund Freud are not just reports of psychoanalytic treatments; they reflect how Freud engaged himself in an ongoing critical dialogue between psychoanalytic theory, technique and practice. The practice of analysing his patients, as well as himself, inspired Freud to adapt his techniques and further develop his theory of the unconscious. Theory, technique and practice constitute an essential trinity within the psychoanalytic tradition.

The clinical or psychodynamic approach to organisational analysis represents an innovative break up of this trinity by substituting the practice of individual treatment for the practice of designing, changing and leading organisations.

The assumption is that aspects of psychoanalytic theory (e.g. the unconscious and defence mechanisms) will enrich the body of existing theories on organisations. An example of this approach is Kets de Vries' seminal work *Neurotic Organisations*.<sup>2</sup> Another assumption is that aspects of psychoanalytic technique will enrich the organisational and managerial methodological repertoire, for instance, by incorporating free association techniques to leadership decision-making processes.

However, within this domain of the clinical approach to organisations, one has to be mindful and careful not to engage in wild analysis by just starting to make interpretations of the unconscious in a non-clinical setting.<sup>3</sup> These assumptions need to be tested in organisational and leadership contexts. This requires again a trinity of theory, technique and practice. This collection of practitioner-researcher papers reflects the fact that the emerging discipline of a psychodynamic-systemic approach to organisations has a strong need of reflective practitioners with the courage and capacity to thoughtfully experiment with the application of elements of psychodynamic-systemic theories and techniques. This volume also provides a series of examples in which our students have engaged in the direct application of the clinical perspective and in so doing have contributed to the emerging field of practitioner applied science from the clinical perspective.

### **Self-as-instrument**

A hallmark of the psychodynamic-systemic approach is the use of *self-as-instrument*. Three conditions matter for making proper use of the self as instrument: understanding yourself as an instrument, looking after yourself as an instrument, and frequently checking the quality of the instrument.<sup>4</sup> While important, from a psychodynamic-systemic perspective these conditions can and should be further elaborated.

The leader, professional, consultant or coach establishes a relationship with the system or a part of the system, which enables the collection of crucial information about and insight into the organisation. The relationship becomes a platform for data collection as well as for intervention. This is analogous with the psychotherapeutic situation where the therapeutic relationship becomes the platform and vehicle for observation and change. For example, using *self-as-instrument* requires the capacity for reflection and exploration when a leader or consultant feels confused, confident or anxious. To what extent does this reflect one's own feelings? Or might one's interpretation be fuelled by



similar feelings in the team or organisation? In psychodynamic-systemic terms, one may experience in oneself what is not of oneself.

The moment that one engages in a direct relationship, one becomes a living and potentially biased part of that equation. How does the relationship and the system impact the self (-as-instrument)? How does the self-influence the relationship both consciously and unconsciously? How can one make sense of, and not become entangled in, the myriad of transferences, counter-transferences and collusive enactments? How can one develop the capacity to listen with the “third ear”, making use of empathy, intuition and associations? <sup>5</sup> All of these and other examples amplify the important expanded understanding of self-as-instrument from a psychodynamic-systemic approach to organisations.

Developing an appropriate (self-) reflective stance is considered to be crucial in order to become receptive and appreciative of these cues. Self-as-instrument requires this reflective stance to avoid moving too quickly and reaching inappropriate or unfounded conclusions or interventions.

### **Developing night vision**

The saying “There is more than meets the eye” can very much be applied to understanding the reality of organisations and change. A premise of the psychodynamic-systemic approach is that all behaviour has a rationale and that it is often determined by unconscious factors. This refers to what we call the “night vision” paradigm: the assumption that there are significant out-of-awareness factors and processes working in all of us at individual, team, or organisational level. These may be linked to the “here and now” (night vision level 1) as well as to the “there and then” (night vision level 2). An example is a team meeting in which one member is unusually silent and withdrawn. The leader is not aware that there has been a recent breach of trust between him and another member of the team (night vision level 1). Nor was he aware that this experience had revived within that team member some old, sensitive, and easily activated feelings of exclusion and rejection (night vision level 2).

Individuals and teams need to develop night vision skills in order to not stumble over objects, fall into invisible traps, or overlook hidden treasures and opportunities. Night vision is not substituting but complementing daylight vision, in much the same way that night vision goggles bring an enhanced capability to one’s vision. In helping leaders and professionals to develop

night vision skills we have come to appreciate and differentiate between the *night vision stance* and the *night vision cycle*. The *night vision stance* is a state of mind, or a state of being in which one navigates through organisational reality with an attitude of wonder and curiosity, not taking issues simply at face value. It is a willingness to explore what one is experiencing in a non-judgmental way, with a capacity to tolerate ambiguity, to appreciate what is emerging and to refrain from coming to a conclusion prematurely.

Imagine a newly appointed CEO who shares her ideas and excitement for a potential strategic merger. She observes a very flat response from the members of the executive board. After a period of silence, one person starts an attack on the plan as well as the process. Though she is tempted to respond immediately in a defensive way, she is able to contain herself and she starts to wonder: Why this intense outburst? Why does there seem to be a complete lack of openness to her ideas? Why this unanticipated attack on her? The exploration of possible factors at play enables her to begin to build various hypotheses in terms of what is happening below the surface in her team. Might this reflect that the team is anxious? Might this attack be fuelled by unacknowledged envy on the part of the attacking party for not having been appointed as CEO? Does all of this come as a complete surprise to her? Or did she ignore early indicators of increasing anxiety and dissatisfaction?

Based on her night vision stance, which gives her the capacity to entertain multiple possible explanations, she decides to first let them express their feelings and thoughts while keeping her initial reflections to herself. By doing so, she is able in the short term to create more space to explore and understand the dynamics, both in herself as well as within her team.

After some further reflections she becomes aware that she indeed has denied early signs of discontent in the team and that she has moved on too fast, disregarding some of the concerns and opinions of her executive team members. She decides to share this perspective with the team while keeping the other hypotheses to herself for the moment (acknowledging that they might also be valid and worthy of exploration at a later point in time).

One uses the *night vision stance* for oneself in one's role. As in the example above, one has to determine if it is wise or appropriate to share one's night vision reflections with others. And if so, then in a manner in which they can be understood and appreciated.

Applying the *night vision cycle* implies a more active, as opposed to reflective, approach. We identify six stages in going through this cycle. It starts with **stage one: triggering, observing and wondering**. Something happens that triggers a wonder and curiosity: might unconscious factors be part of what is going on? If one feels that this might be the case, then it should be shared with the team, as the CEO in the above example chose to do. Based on an exploration of the topic that surfaced, the team might decide to further explore the issue. This requires a different state of mind and operating.

It leads the team to move to **stage two** of the cycle: *creating and entering a reflective space*. This involves putting logical, systematic thinking for a moment on hold and allowing one to leave the dance floor, go out on the balcony and enter a reflective space. It also requires tolerating ambiguities, silences and the unknown, to be open to whatever emerges, and containing a spectrum of often conflicting thoughts and feelings.

This reflective space is a precondition to proceed to the **third stage** of the cycle: *associating*. Team members apply here the principle or technique of free association: sharing with one another whatever feelings, thoughts or fantasies that come to their mind. This is a non-judgmental space in which there are no good or bad nor right or wrong contributions. Listening, for example, to a story of an HR director who describes the stagnated integration of two divisions of the company, several others share associations of burning castles and water floods. Freud pointed out that associations and dreams help us to connect to unconscious reality. It is not that associations should prevail over logical thinking. Associations can provide us with crucial additional categories of data we need to take into account for purposes of sense making and decision making. Much of our emotional and social reality is based on associative principles. That is why it is so important to be able to switch between the traditional causality-paradigm (identifying logical causes to events) and the night-vision paradigm (following the track of associations).

It is possible that the associations generated may enable the team to move to **stage four** of the night vision cycle: *spiking*. This is about linking conscious with unconscious elements. Take the example of a senior executive in an organisation who becomes very anxious when he is offered the number one position, which he immediately refuses. He does not understand this anxiety as long as he focuses on finding a cause by thinking about it. However, in the associative mode, his first association with his refusal to accept the position is of being humiliated and bullied as a young boy at school. The painful experiences of being bullied led to him being mostly passive and a tendency

to play the role of victim. However, on rare occasions he acted aggressively in an uncontrollable way, which frightened both him and others.

In the spike of his association he identified a pattern, which is **stage five** of the night vision cycle: *patterning*. The pattern in our example is that he tended to avoid positions of being the identifiable leader or number one person. He always managed to find a position of N-1, shielded by someone willing and able to do the necessary fighting and confrontations that go with the top role. Emotionally and unconsciously he associated being number one with his feared incapacity of handling conflicts and confrontations.

Having identified this as a recurrent pattern in his life and career, he was able to progress to **stage six**: *linking* the issue at hand (refusal to accept the CEO position) with underlying emotional, cognitive and behavioural patterns. This awareness helped him to develop other options than accepting or rejecting the offer. He managed to become aware of and address the underlying unresolved emotional issue in such a manner that he was able to move forward in his career development.

The various chapters in this book represent each in its own way fruitful application of night vision, linking out-of-awareness factors to significant issues at hand. They are building blocks for the emerging discipline, developed in the unique trinity of theory, technique and practice of each of the authors. The night vision cycle and the night vision stance are examples of psychodynamic-systemic techniques, which can be applied in the various organisational and leadership practices around the world. We wish to thank the authors of these chapters for their willingness to contribute to this volume and by doing so, assist in building a field of study based on the INSEAD EMCCC program.



**Figure 1. The Night Vision Cycle (from van de Loo, E., Lehman, R. and Book, H. *Night Vision, forthcoming*)**

<sup>1</sup> Derksen, J. (1983). *Psychotherapieën in het geding. Een structurele analyse met behulp van de psychoanalytische theorie.* Baarn: Uitgeverij Nelissen.

<sup>2</sup> Kets de Vries, M.F.R. and D. Miller (1987). *The Neurotic Organisation.* San Francisco: Jossey-Bass Publishers.

<sup>3</sup> Zaleznik, A. (2016). The case for not interpreting unconscious mental life in consulting to organisations. In: M.F.R. Kets de Vries, K. Korotov, E. Florent-Treacy and C. Rook (Eds.). *Coach and Couch* (2<sup>nd</sup> ed.). Palgrave Macmillan, UK, pp. 86-105.

<sup>4</sup> Bachkirova, T. (2016). The self of the coach: conceptualization, issues and opportunities for practitioner development. *Consulting Psychology Journal: Practice and Research*, 68, 2, 143-156.

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