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LEADING TRANSFORMATION IN TURBULENT TIMES

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Introduction

Growing numbers of us have a dream of a world without war, where all living things flourish in harmony, and where all children can grow up feeling safe and cherished. We have a long way to go to realize this dream, and there are many challenges facing humanity. There are also many opportunities. Old leadership paradigms do not serve the world that is emerging now. In turbulent times, we have been hard-wired to focus on problems rather than dreams, but it will be dreams that save us.

Amid unprecedented and unpredictable change globally, new kinds of leaders are emerging at the spiritual edge. The challenges facing humanity are so immense and so systemically interconnected that to respond effectively, we must evolve to a higher level of consciousness. Together, these entangled challenges are referred to as the meta-crisis—a crisis of overlapping crises—and they require metamodern solutions that include spirituality and higher states of consciousness (Freinacht, 2017). Freinacht described “metamodern” as the mindset that is evolving out of the modernist and post-modernist mindsets. In these times of ecological disaster, increasing authoritarianism, and growing social injustice, we are called to move beyond the traditional modernist and capitalist mindsets and beyond the post-modern critique of modernism and capitalism to a worldview that transcends and includes the realities that have gone before, and this movement must include spirituality. Modernism and post-modernism have been materialistic

and ego-centric movements, and have neglected the spiritual consciousness that includes compassion, interconnection, and altruism.

Evolution is a natural force for growth, and we are naturally expanding our human capacities and potential not just individually but collectively. We can intentionally expand our capacities and potential through spiritual awakening and spiritual practices. We are in these turbulent times together. While humanity is faced with the challenges of the meta-crisis, people are coming together with new visions, methods, and models to create a flourishing world. New initiatives, groups, and organizations are committed to a new era of well-being and flourishing for all life (Tsao, 2023). These initiatives and groups do not make headlines. They are below the radar, a quiet revolution. And they constitute a growing and interconnected movement that incorporates full human potential, spirituality, and the evolution of higher consciousness. They are at the leading edge of collective transformation.

The field of leadership is coming to include a more holistic view of the qualities and skills for responding to the meta-crisis and beginning to envision and manifest new ways of being and new systemic approaches to building a flourishing world. It is important to remember that not everyone comes to leadership at the spiritual edge at the same time and in the same way. Therefore, how do metamodern leaders understand and work with transforming the meta-crisis into a more conscious way of being that is both proactive and responsive in the face of change?

The Archetypes of Change model, originally called the Organizational Orientation model (Neal, 2006), is one approach that helps leaders and organizations to understand and work with five common worldviews about change and transformation. The five archetypes are: (1) Edgewalkers, (2) Flamekeepers, (3) Hearhtenders, (4) Placeholders, and (5) Guardians.

The Archetypes of Change model helps leaders to assess their teams and their overall organizational culture. The model provides insights into openness to spiritual-based or human values-based language and approaches within the culture. With this understanding, leaders can develop strategies and programs that support the healthiest and most effective responses to changes in their environment, including the proactive creation of a spiritual-centered culture. The model helps leaders to assess which of the five archetypes is their predominant default mode as well as which archetypes can be called upon in different contexts and situations.

This chapter describes the development of the Archetypes of Change model and provides detailed descriptions of each of the five archetypes at the organizational level. The chapter concludes with practical applications of the model applied to organizations for leading from the spiritual edge.

The Development of The Model

I began conducting research on workplace spirituality in 1992 with a focus on the ways individuals and leaders were integrating their personal spiritual journeys with their career journeys. I came to see these leaders as having a foot in the material world and a foot in the spiritual world. I refer to those who integrate these two worlds as *Edgewalkers*. Patterns began to emerge in peoples' responses to my questions about what helped them to navigate the terrain between these two seemingly very different worlds. Using grounded theory, I identified five qualities of an Edgewalker: (1) self-awareness, (2) passion, (3) integrity, (4) vision, and (5) playfulness. Five skills emerged from an analysis of their interviews and stories: (1) knowing the future, (2) risk-taking, (3) manifesting, (4) focusing, and (5) connecting (Neal, 2006).

An instrument measuring these five qualities and skills was developed and was tested for reliability and validity. A strong correlation was found between measuring high on Edgewalker qualities and skills and being high on the seven factors of personal resilience to change (Neal & Hoopes, 2013). The seven factors of personal resilience to change are: (1) positive: the world, (2) positive: yourself, (3) focused, (4) flexible: thoughts, (5) flexible: social, (6) organized, and (7) proactive (p. 438).

For more than 20 years, my colleagues and I have been offering Edgewalker workshops and retreats during which we share a checklist (Neal 2006, p. 20) titled, *Are You an Edgewalker?* (Box 1). Participants are told that, while this checklist is not scientific, if they checked 12 or more items on the checklist, they were more than likely an Edgewalker. A question that frequently arose after completing the checklist was, "What if I'm not an Edgewalker? I don't relate to most of the items in this list. What is my value to the organization and to the changes we are experiencing?" As an organization development consultant, I realized that my view of how people relate to change was narrow and biased towards a spiritual view. I expected people to be excited about potential changes and want to dive right in, but upon reflection on the organizational changes I have been involved in, this is not how most people respond. I started thinking about the most common responses to change that I have observed and developed what was originally called the organizational orientations model (Neal, 2011) and is now more accurately called the Archetypes of Change model. Each of the five Archetypes has a spiritual aspect to it that can be enhanced through leadership development approaches that align with that particular archetype.

BOX 10.1 ARE YOU AN EDGEWALKER? CHECKLIST

- I have a strong spiritual life.
- I frequently feel different from most people.
- I seem to have the ability to sense coming trends before they emerge.
- I have an unusual combination of interests and passions
- I have had mystical or spiritual experiences that have provided guidance in my everyday life and/or work.
- I speak more than one language or have deep familiarity with more than one culture.
- I have made, or am contemplating, a major career shift that no one would have predicted.
- I often find myself being a bridge or “translator” for people from very different backgrounds.
- I have this feeling that I was called to do something very special and important in the world.
- I find myself attracted to and wanting to learn from people who are very different from me.
- I am strongly aware of the problems of the whole planet (global warming, destruction of rain forests, overpopulation, exploitation of people in poorer countries) and want to see some more action on them.
- People often see me as a leader, even though I am different from most of the people who have been leaders in that organization.
- I have the ability to listen beyond the words that are spoken.
- I consciously tune into something higher than myself for guidance and inspiration.
- It is extremely important to me that my work be aligned with my deepest values.
- I have artistic abilities or unusual gifts that I combine with down-to-earth practical skills.
- I tend to bend the rules if I think it is for a higher purpose.
- People often see me as a risk-taker, but the things I do don’t seem risky to me. Somehow, I just know they will work out.
- I have a strong sense of adventure.
- I find myself exploring new ideas and wondering about what the next new thing is in my field or area of interest.

The Archetypes of Change Model

There are two primary dimensions to the Archetypes of Change model: (1) orientation to time and (2) orientation to change. These orientations can vary in different circumstances or contexts. In healthy leaders, they are not rigid personality constructs, and in healthy organizations, they are not a rigid part of the culture.

Orientation to Time

For simplification, orientation to time is defined as a continuum with three variables: (1) focused on the past, (2) focused on the present, and (3) focused on the future.

Focused on the Past

We all know people who love to talk about the “good ol’ days” and the way things used to be. They are the keepers of the memories, and in the best of circumstances, they are the ones who can tell stories of the past that carry universal messages or guiding principles for today’s world. Their focus on the past can be a longing for a real or imagined past that was better than the current times and can be healthy or unhealthy. This focus becomes unhealthy when an individual or an organization becomes stuck and unable to consider options for moving forward into the future. Humans, as living systems, must be able to adapt to changes in our internal states as well as to the world around us.

Organizations that are focused on the past need to make a choice. Is the focus on the past helpful because it guides the organization to stay in alignment with the founding vision and purpose? Or does the focus on the past keep the organization from adapting to a world that is rapidly changing? There is always something valuable from the past. Two key questions are: what to keep, and what to let go of. If an organization is in a very stable environment, then a focus on the past is beneficial, particularly a focus on what has worked over the years. Organizations that have a monopoly or organizations that have very little interaction with the outside world, like a monastery or a prison, may function very well with a time orientation towards the past. However, the reality is that very few organizations fit that profile.

Focused on the Future

Let us look at the other end of the time orientation continuum: a focus on the future.

There are three primary ways that future-oriented leaders anticipate what will be unfolding:

First, there is the rational, data-gathering, mathematical-modeling method of understanding the future. This is the “Traditional” method of knowing the future. The key skill is being able to gather and analyze concrete data.

The second approach is the gut-level, shamanic, divination approach to embracing the future. The key skill is being able to read the subtle signs of what is unfolding. This is the “Intuitive” approach to knowing the future.

The third way to know the future is to be actively involved in creating it. This is the “Co-creative” approach to knowing the future. The key skills are to be able to have a vision of what you want to have unfold and to take action to begin to make it real.

(Neal, 2006, pp. 47–48)

Those who are focused on the future often feel a sense of dissatisfaction about what is happening in the present. They have a drive to make things better. There is a concept called *preemptive transformation* that Freeland (2019) idiomatically defines in the subtitle of his article as, “even if it ‘ain’t broke, you still ought to fix it.” Leaders who are focused on the future are not satisfied with the status quo and are really drawn to the idea of continuous improvement. There is a restlessness and an excitement about them. They enjoy thinking of themselves as disrupters. They are easily bored and can fall into the trap of creating something new just for the thrill of it rather than being strategically creative.

Just as some organizations are focused on the past, there are other organizations such as high-tech companies as well as many cutting-edge financial firms whose time orientation is fixed on the future. Silicon Valley, as a region, is famous for its futuristic orientation. This time orientation can also be healthy or unhealthy. A healthy focus on the future builds on what is best in the past, particularly on core values. An unhealthy focus on the future can lead to pushing ethical boundaries as the organization treads into uncharted territories with products and services that have never been offered before. The economic crash of 2008 provides many examples of an unhealthy approach to the future. The corporate landscape is littered with organizations that went too far over the edge, often driven by leadership ego and chutzpah. Too much of a focus on the future can lead to missing cues in the environment about what is so in the present. A healthy focus on the future encourages experimentation, calculated risk-taking, and a little bit of craziness.

For organizations in turbulent times, which is almost all organizations, it is essential to have an interest in the future and to have methodologies or practices for developing a healthy relationship with the future.

Focused on the Present

At workshops on the Archetypes of Change, there are usually some participants who are committed to Eastern contemplative traditions that teach being in the present moment. These participants can sometimes be uncomfortable with the idea that there are benefits to focusing on the past or the future. They are correct about focusing on the present moment when we are working on our mindfulness, equanimity, and consciousness. Leaders who have some form of mindfulness or contemplative practice tend to be more effective leaders (Tsao & Laszlo, 2019). However, that's not what is being discussed in this section. It is possible to be mindful and in present-moment-awareness when you are focusing on the past, present, or future regarding organizational action.

A focus on the present has an action-oriented quality to it. It holds questions such as: What is right here in front of us that we need to pay attention to right now? What is the squeaky wheel here? What is mine to do? What are today's priorities? Leaders who have a time orientation that is present-focused are likely to care about execution and to be skilled at it. They value efficiency, often feeling that time is short and deadlines are looming.

An organization that is present-focused is likely to be a younger organization—one that does not have as much of a past to refer to. It has the tendency to be highly responsive to rapid changes in the environment. If it is a healthy organization, it can adapt quickly to opportunities and is not blocked by tradition, history, or “the way we've always done things.” The shadow side of an organization that is primarily focused on the present is that it can feel chaotic as it lurches from one project or market to the next, perhaps never fully realizing the investment in what it had recently been working on. It may not value relationships and or building long-term trust with employees, vendors, and customers, and may treat its stakeholders only in instrumental terms.

Orientation to Change

For simplification, orientation to change is defined as a continuum with three variables (1) closed to change, (2) neutral about change, and (3) open to change.

Closed to Change

For some leaders and organizations, change is uncomfortable and can be fear-provoking. It takes time and energy to deal with changes, and that time and energy take away from productivity. Change can be stressful. It is common to resist change that has been imposed on you, but people can also have mixed feelings about changes they have chosen. They may not have the skills or experience to be resilient in the face of change (Hoopes & Kelly, 2004). Or they may have a history of traumatic changes that have led to loss and suffering. In this case, their relationship to change has been historically negative and they may find it hard to believe that new changes could be positive. Some leaders are just more comfortable and operate more effectively when things are stable and predictable. They can focus on what is important to them, and even develop a sense of mastery from doing something well over a long period of time.

If an organization is in a stable and predictable environment, it has probably been rewarded by the marketplace for doing something very well. That is hard to let go of, and there may be no reason to change. Another reason an organization might be closed to change is that the organization provides a product or service that no other organization can provide, so it is able to keep doing what it has always done. Some organizations are closed to change because the charismatic founder or owner is still in charge, and no one wants to confront them.

There is no judgment about individuals and organizations that are generally closed to change. This orientation to change may be a perfect fit for the circumstances. But as mentioned earlier, these kinds of circumstances are rare, and most of us find ourselves periodically confronted with the need to change. Having some resilience in the face of change (Hoopes & Kelly, 2004) tends to provide more adaptability and growth for both individuals and organizations. We will now explore the other end of the change continuum, open to change.

Open to Change

Openness to change results in less burnout and is positively associated with work engagement, job satisfaction, and quality of work (Sinval et al., 2021). There are levels of openness to change. Some leaders and organizations may accept change with little resistance. Other leaders and organizations actively embrace and take pride in change and innovation.

A leader who is open to change tends to have an optimistic view of people and of the world (Seligman, 2002). They have a spiritual sense of trust that things are likely to work and self-confidence that can help them to

figure out how to get where they want to go, even if the road is not clear. They have an intuitive sense of what the next step is and a willingness to experiment. Some may even talk about feeling guided by something greater than themselves. These leaders know that when systems are in flux from one state to another, there are more opportunities to take chances and to intervene. When an organizational change process is occurring, they are likely to volunteer for the design team or to take leadership on new initiatives. They want to be involved in helping change to happen.

An organization that is open to change has leaders at the top who are open to change. These leaders set the tone for the culture. They tend to have an entrepreneurial streak. They may also be comfortable with, and encourage, calculated risk-taking. Some industries by nature require an openness to change. For example, fashion, entertainment, and technology are industries that require rapid alignment with customer preferences. Some industries—such as technology—work hard to influence customer preferences by creating products and services people did not even know they needed. A case in point is the rapid adoption of artificial intelligence and chatbots.

If we observe organizations over time that are open to change, an interesting distinction arises. They are generally more adaptive to rapidly changing environments, but the ones that have financial and reputational stability are the ones that are spiritually based or values-centered (Pruzan et al., 2007; Sisodia et al., 2007). The organizations that play fast and loose with ethics often achieve temporary superstar status but then crash and burn in scandal, with huge financial losses to stakeholders.

The level of openness to change can vary depending on the situation. An individual may be more open to change in some circumstances and closed to change in others. It is the same for organizations. The important thing is whether the openness to change is a fit for the environment the individual or organization is in. The more turbulent and unpredictable the environment, the more openness to change is required.

Neutral about Change

In the middle of the change continuum is a neutral space. Leaders and organizations that are neutral to change take the attitude of, “well, it depends.” They are neither as rigid as those who are closed to change nor as enthusiastic as those who are open to change. Instead, they take a wait-and-see stance.

At the individual level, those who are neutral about change are most likely to be concerned about how the change will affect their work efficiency. Some organizational change processes in their past probably made things worse, and some made them better. Their willingness to accept a change

also depends on how much learning is required, and how comfortable they are with learning new things.

At the organizational level, the neutral response to change is often predicated on their strategy of being neither first nor last with an innovation or a strategic decision. The organization waits and watches the actions and outcomes when their competitors stick their neck out and try something new. These organizations don't want to be the last ones on the train, and at the same time, they have some level of caution about moving into areas that have never been tried before.

In some ways, this neutral zone is a temporary place to dwell. Eventually, the individual or organization must decide either to adopt change or to reject it, to move towards openness or to become closed to this particular change.

Summary of the Archetypes of Change Model Dimensions

Individuals, leaders, and organizations tend to have a place along the time continuum and the change continuum that feels natural to them. Certain professions also have a common orientation to time and to change. The level of leadership in the organization can also have an impact on time orientation as well as change orientation. In my decades of experience as an organizational consultant, the higher a leader is in the organization hierarchy, the more future-oriented and change-oriented he or she is. The lower a leader is in the organization, the more past or present-oriented they are, and the more likely they are to be closed to or neutral about change. Finally, it should be noted that there are many other factors that can influence these continua, and these factors change depending on circumstances.

The Five Archetypes of Change at the Organizational Level

I have written elsewhere about the five archetypes of change at the individual level (Neal, 2006, 2011). In this section, each of the archetypes will be described at the organizational level.

To lay the groundwork for understanding the organizational archetypes, here is a brief definition of the individual archetypes.

- Referring to Figure 10.1, the upper right-hand corner is the quadrant that is high on openness to change and is focused on the present. This quadrant is labeled “Edgewalkers,” defined as leaders who walk between worlds and have the ability to build bridges between different worlds. They have a strong spiritual life and are also very grounded and effective in the everyday material world (Neal, 2006). This archetype is the

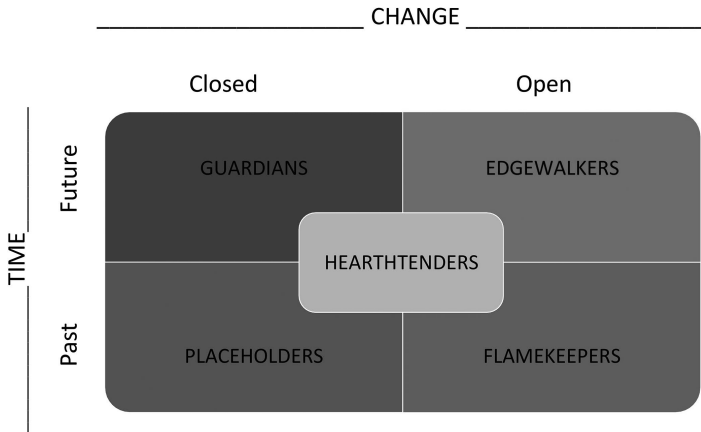


FIGURE 10.1 The Five Archetypes of Change

Note: Adapted from “Organizational Orientation” by Neal (2006).

leadership archetype that is most intentional and open about spiritual approaches to organizational change. The integration of spiritual values and practices in all aspects of leadership is important to them.

- The lower right-hand corner is the area where people are open to change but focused on the past. This is the quadrant of the “Flamekeepers,” defined as leaders who keep the original vision and values of the organization alive (Neal, 2006). From a spiritual leadership perspective, this archetype might not speak or act openly about the integration of spirituality in organizational change. However, the leader is likely guided internally by their faith or spiritual tradition’s values, which might be expressed in more secular ways.
- The lower left-hand corner is the quadrant representing those who are closed to change and focused on the past. This is the worldview of the “Placeholders,” defined as leaders who can provide stability and predictability to the organization. They are the keepers of the boundaries and can keep an organization from going over the edge. They tend to resist change made just for the sake of change and are comfortable with routine (Neal, 2006). While I do not have any research to back this up, I hypothesize that leaders with a strong Placeholder archetype are more likely to be religious in a traditional or conservative faith.
- The upper left-hand corner is the area representing being closed to change with a focus on the future. This quadrant represents “Guardians” (originally called “Doomsayers”) who are defined as leaders who tend to see all the things that could potentially be a future problem. They

have a gift for analyzing and/or sensing what could go wrong before it happens. They are committed to protecting people and the organization from potential harm (Neal, 2006). In most spiritual and religious traditions, there are those who have the gift of prophesy or divination. The prophet or shaman is the spiritual equivalent of the “Guardian” archetype in leadership.

- The box in the center represents the area that is neutral about change and focused on the present. This is the “Hearthtender” domain and is defined as leaders who get the day-to-day work of the organization done and who are focused on serving others (Neal, 2006). From a leadership perspective, I hypothesize that the Hearthtender archetype is likely to draw clear boundaries between their professional, personal, and spiritual lives. The primary way a Hearthtender leader expresses his or her spirituality at work is likely to be through creating a sense of fellowship or family in the workplace.

When I was creating this model, I thought these archetypes were personality characteristics and therefore not easily changed. I discovered that this is incorrect. The archetypes are worldviews or orientations—certain ways of seeing the world. They are easily changed through experience, self-awareness, coaching, and training, and they may vary due to circumstances. We can come from an Edgewalker perspective when leading our teams, for instance, and then come from a Placeholder perspective when working with our faith community. Most people have one orientation that is their usual, comfortable default. We all have the seeds of each archetype within us, and personal and leadership mastery comes from understanding the usefulness of each archetype in various situations. Awareness of these archetypes is also very useful in helping us understand others who may not respond to organizational change in the same ways we ourselves do. This awareness can be gained through a research-based assessment tool called the *Archetypes of Change–Individual* and is available to help individuals and teams to manage change more effectively. (Visit: <https://edgewalkers.org/the-five-orientations-surveys/>). The key thing to remember about any survey result is that the quantitative results are not *The Truth*. They are only a summary of employee perceptions and opinions, and a clearer sense of the truth can emerge with a generative conversation about the survey results, which can be followed by a conversation for action.

Next are descriptions of each of the five Archetypes of Change at the organizational level. What does it mean to be an Edgewalker organization or a Placeholder organization? Once leaders have a sense of the primary archetype that is expressed in their organizational culture, they can assess whether it is the most effective archetype for the challenges and opportunities faced

by the organization. The descriptions below describe the characteristics and strengths of each of the five organizational archetypes. Each archetype may also have potential downfalls or shadow sides that may arise from carrying that worldview to an extreme. (For a detailed discussion on shadow work, see Chapter 13).

The Edgewalker Organization Archetype

The Edgewalker Organization seeks to be on the leading edge, is curious about what is emerging just over the horizon, supports creativity and innovation, and nurtures the human spirit. Leaders support team member spiritual development and may encourage shared spiritual practices such as opening meetings with a moment of silence. They develop collective methods of knowing the future such as forecasting and visioning. Risk-taking is encouraged and rewarded. The leaders understand how to use values, imagery, and inspiration to paint a picture of a desired future. Employees are imaginative, empowered, and know how to create what has never been created before. The Edgewalker organization archetype typically values great diversity in its leaders and employees. Differences are valued to a much greater degree than in a traditional organization, simply because Edgewalkers are curious and always wanting to learn about other people's worldviews. In time orientation, the organization primarily focuses on the future. The Edgewalker organization archetype not only embraces change, but it also seeks to create change and enjoys disturbing equilibrium. It tends to be a pioneer in workplace spirituality initiatives (Neal, 2018). The leaders in Edgewalker organizations are more likely to be in alignment with Allen and Fry's (2023) framework for leader, spiritual, and moral development. (For a more in-depth description of models of leadership and spiritual development, see Chapter 1).

The shadow side of an Edgewalker organization is that it may value newness, creativity, and risk so much that it does not put enough time and energy into systems that can help the organization to be stable and sustainable. The organization may ignore wisdom and experience from the past and could get so caught up in creating new rules for the game that it crosses over into actions that could be inappropriate or even lacking in integrity and ethics. It may also be so caught up in its vision of creating the future that it ignores external signs of events or trends that could be threatening to the ability to flourish in the future. Leaders in an Edgewalker organization may develop a collective egotistical sense of spiritual superiority over organizations that are not as explicitly spiritual, leading to a cult-like organizational culture that can blind it toward external realities. (Chapter 4 describes a "spiritually-structured organization" which has many similarities to the Edgewalker Organization described here).

The Flamekeeper Organization Archetype

A Flamekeeper organization is values centered. These values usually come from the founding values of the organization and may have been modified and refined over time. A Flamekeeper organization is one that considers its values when making major business decisions and is willing to take a stand for its core values, even when it may not make short-term bottom-line sense. There is a strong correlation between being a values-centered organization and having higher employee and customer loyalty, greater market share, and higher profit (Sisodia et al., 2007). The Flamekeeper organization is very clear about having a larger sense of mission and purpose in the world, which is typically attractive to high-talent employees. All members of the organization are likely to be very familiar with the organizational values. They can easily describe how the values are lived every day in the workplace. In time orientation, the Flamekeeper Organization focuses on the past, particularly the founding values. The Flamekeeper Organization welcomes change if the changes are in alignment with organizational values and vision. In some Flamekeeper organizations, the founders instilled their religious values into the culture from the beginning with enduring positive effects (Mitroff & Denton, 1999; Neal & Vallejo, 2008).

The shadow side of a Flamekeeper organization can emerge when the focus on core values becomes so central to how decisions and actions are undertaken that the organization becomes bogged down in values analysis and second-guessing its actions. If the Flamekeeper organization was founded on religious principles, it may have diversity, equity, and inclusion (DEI) challenges in an environment that has grown more litigious (Sullivan, 2013). It may also focus so much on the past that it does not scan the environment for new opportunities or possibilities. In general, the Flamekeeper organization is open to change, but it tends to run decisions and choices through the filter of the past, which can make the organization less nimble.

The Hearthtender Organizational Archetype

The Hearthtender organization is focused on efficiency, task orientation, and process. The organization is likely to have a strong interest in creating systems and controls so that things run smoothly. Leaders and their followers have clear expectations of what they are supposed to be doing in their work. Leaders emphasize process and procedures, although they also consider employee needs and responses. In fact, there are probably procedures and policies in place about tending to employee needs. Hearthtender organizations often have a core focus on service: they *tend the hearth*. This focus on service may either come from a core spiritual value around being of

service, or it may be more instrumentally driven. Customers can sense when the service is from the heart or is by rote (Bayighomog & Arash, 2019). The Hearttender organization focuses on the short-term needs of customers and employees and other stakeholders. This can allow leaders to be nimble if stakeholder needs change, but they tend not to think ahead and anticipate longer-term needs and possibilities. At the same time, they do not get stuck in the past. Leaders just want to do what works. In time orientation, the Hearttender organization archetype is focused on the present time and the short-term. The Hearttender organization typically prefers to avoid change because change can negatively impact efficiency and systems, but its leaders welcome changes that make the system more effective.

The shadow side of Hearttender organizational archetype is that it may place too much emphasis on procedures and policies. In my experience, this can create a rigid bureaucracy and can reduce the slack that is needed to respond to situations in a spontaneous and unique way. An organization of this type can get so fixated on predictability and reliability that it becomes machine-like and loses a sense of aliveness and creativity. In general, the Hearttender organization is not interested in creating or responding to change unless it is clear that the change is going to make work easier. However, too much reliance on proof of success can get in the way of taking calculated risks that could have a high payoff. If the organization becomes too rules-bound and process-focused, leaders who are more spiritually focused may reduce their commitment or even leave.

The Placeholder Organizational Archetype of Change

The Placeholder organization is focused on the past and more interested in stability than change. This organizational archetype focuses on tradition and loyalty and long-term relationships with employees, vendors, and other stakeholders. Leaders and employees in the organization may long for the past, which seems better to them than the current situation, and they may be right that the past was better. Some leaders may refer to the past for guidance in current and future actions. It is common to hear leaders in Placeholder organizations say, "This is the way we've always done things." The Placeholder organization is not likely to look outside itself for competitive ideas, and in fact may even see itself as immune from competition. The culture of the organization may be referred to as family-like because of the long-term relationships and strong sense of loyalty. The traditions of the organization may be based on the religious or spiritual practices of the founder(s) and are unlikely to be questioned. Placeholder organizations can be successful in stable environments where there is little or no competition. In time orientation, the Placeholder organization focuses on the past and it

tends to resist change, unless the changes are going back to the way things used to be. A Placeholder organization may have experienced success in the past and may have an attachment to continuing to do what has always worked.

The shadow side of a Placeholder organization can come from too much emphasis on the past and on the way, things used to be. This can blind the organization to current and future problems and opportunities. The focus on the past and on stability can also keep the organization from taking risks that could lead to entrepreneurial gain. The leadership may use its authority to preserve its power rather than to serve the mission of the organization, which can lead to a highly politicized working environment. People may spend more time protecting their turf than helping the organization be effective.

The Guardian Organizational Archetype of Change

The Guardian organization is focused on problem prevention and protecting what is important to the organization: thinking about what could go wrong and then creating an action plan so that potentially harmful things do not occur. The products and services may be those that offer peace of mind or protection to customers. Guardian organizations tend to rely on analytical tools and approaches to decision-making and forecasting that allow them to predict and prepare for an uncertain future, such as scenario planning, risk assessment, and linear forecasting. In time orientation, the Guardian organization is focused on the future and on thinking through contingencies for responding to an uncertain future. Paradoxically, leaders in Guardian organizations are also likely to be intuitive or to have a gut sense of what might unfold in the future. This intuition and/or sensing can be enhanced by spiritual and contemplative practices (Tsao & Laszlo, 2019). Guardian organizations tend to be slow in initiating change because they are afraid something will go wrong and things will get worse. On the other hand, Guardian organizations are willing to implement organizational changes to avoid potential threats to organizational well-being.

The shadow side of a Guardian organization is that it may put too much emphasis on problem prevention and on what could go wrong. This can create a culture that is based on fear. Just as the problem-solving rational part of the human brain shuts down when individuals become fearful making them unable to think as clearly in a crisis, the same thing can happen in an organization's culture (Cooperrider & Srivastva, 2017). Collectively, people will have less of an ability to respond effectively if they are fearful. Leadership in a Guardian organization is likely to be hierarchical and even parental, ranging from benevolent parental leadership ("Let us take care of

you”) to autocratic dictator (“It’s a scary world, and I know what’s best for you”). Employees who belong to patriarchal or autocratic religious organizations will probably find the Guardian organizational archetype familiar and maybe even comfortable. If the workforce is young and inexperienced, this kind of Guardian archetype leadership can be effective, but in a mature organization, leading through fear will drive out the organization’s creative talent.

Practical Leadership Applications in Utilizing the Archetypes of Change Model

Here are several principles to keep in mind when leaders are working with the Archetypes of Change model:

- Remember that each archetype is not a personality or cultural characteristic and that a person’s worldview or orientation to change can shift in different situations and even in different stages of life.
- When an organization is experiencing significant change, honor that each archetype brings a valuable perspective. Listen for the wisdom of each archetype.
- As leaders of change, focus on amplifying the strengths of each archetype. At the same time, be aware of your own shadows or blind spots.
- When contemplating an organizational change, leadership or the planning team can take time to contemplate, “How would an Edgewalker see this? How would a Flamekeeper see this?” and so on.
- Consider creating an organizational map of archetypes. As a simple exercise, the leadership can take a large sheet of paper and colored markers and draw a symbolic representation of their organization. Then each person fills in which subsections of the organization (departments, teams, functions, and so on) are more likely to hold the energy of each of the archetypes. Where are you most likely to find Flamekeepers or Placeholder, for example? Then compare maps and explore how these perceptions fit with what archetypes are needed for ongoing organizational success.
- Use the Archetypes Circle exercise found in the appendix of this chapter (Appendix A). This exercise invites leaders or change agents to take on the mindset of each of the archetypes, one at a time.

A systemic approach to bringing in the Archetypes of Change model into an organizational change process is to have each member of the organization take the Archetypes of Change-Individual survey so that they each know their own archetype profile. Then, have all employees take the Archetypes of Change-Organization survey (<https://edgewalkers.org/the-five->

orientations-surveys/) that provides an assessment of how the employees perceive the leadership culture of the organization. By taking these two assessments, individuals can get a sense of where their individual archetype can contribute to organizational efforts, and the leaders of the organization can get a picture of how employees in various parts of the organization perceive the organization's response to change. As with any assessment tools, the real power is in the conversation that follows the reporting of the data and the action items that result from that conversation.

Summary

This chapter has presented the theoretical underpinnings of the Archetypes of Change model, described the five archetypes of change at the leadership cultural level, and offered several practical ways to work with the Archetypes of Change so that the leader can guide the organization to be more resilient to change, more in alignment with its values, and can understand where the resistance might be so that it can be transformed to higher engagement, meaning, and purpose. Leadership at the spiritual edge is a commitment to individual and collective evolution, and the more we understand about our ways of seeing the world and seeing each other, the more we grow toward our individual and collective spiritual edges. The Archetypes of Change model is a research-based approach to supporting this growth.

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APPENDIX A

Archetypes Circle Exercise

Purpose

- To expand team perspectives on a particular change or challenge.
- To increase empathy for perspectives different from your own.
- To open up new possibilities for problem solving and generative ideas.
- To help the team feel more aligned in co-creating the future.

Roles

- Facilitator
- Five members of the change team to represent the five archetypes
- Scribe
- Stakeholders of the change as observers

The facilitator describes the steps of this exercise and asks all participants to pay attention to their own internal reactions to what they hear, and to pay attention to when the group energy increases and when it declines. Note-taking can be encouraged.

Step 1

All members of the team take the **Archetypes of Change – Individual Survey** at: <https://edgewalkers.org/the-five-orientations-surveys/>

The facilitator provides a brief overview/reminder of each of the five archetypes.

Step 2

Each team member shares their dominant Archetype and talks about what gift this archetype might bring a change initiative. Depending on the group size, you might want to break people up into groups of three or four people for this.

Step 3

The team creates a shared statement about the change they are facing. The scribe writes this on a whiteboard or flip chart where everyone can see.

Step 4

Select five people to represent each Archetype of Change. This could be based on their survey or self-assessment results, but it doesn't have to be.

Step 5

Create an Archetypes of Change circle of five chairs in the middle of the room. Put a paper or post-it sign on the back of each chair for each Archetype of Change. In other words, there is a chair for the Edgewalker perspective, a chair for the Flamekeeper perspective, and so on. Set up chairs around the Archetypes of Change circle for other stakeholders in the change. This will be in fishbowl style. The five members of the change team sit in the five chairs.

Step 6

The facilitator reads the shared statement of the change to the group and then asks each representative of an Archetype of Change to comment on the change from that particular perspective. For example, the Edgewalker Archetype might talk about how he or she is excited about the change and what they can envision. The Guardian might talk about his or her perspective on what could go wrong and how they want to protect the organization from harm. Each person should speak for about two minutes.

Step 7

Each person moves one chair to the right and now gives voice to the new archetype perspective he or she represents. About one minute each. Continue this process until everyone has had the chance to speak from all five of the Archetypes of Change. The facilitator encourages each person in the circle of five to really get into the role of each archetype and to resist falling back into the archetype that is most comfortable for them unless they happen to be sitting in that particular archetype's chair. Much learning can come from embodying a perspective that is different from your own.

Step 8

The facilitator leads a discussion with the following questions; first asking the members of the circle of five about their experience and then asking the stakeholder/observers for what they noticed. The scribe captures key points as people debrief.

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Potential discussion questions:

For circle of five:

- What did you notice about yourself and your energy as you took on each Archetype of Change role? What was easiest? What was the hardest?
- What did you hear from others in the circle that inspired you?
- What surprised you?
- Where is the resistance, and how can it be honored? Can it be transformed? If so, how?
- How might these insights lead to action to move the change forward?

For stakeholder/observers:

- What did you notice about yourself and your energy as you listened to Archetype of Change sharing? Which did you resonate with the most? The least? Why?
- What did you hear from members in the circle of five that inspired you?
- What surprised you?
- Where is the resistance, and how can it be honored? Can it be transformed? If so, how?
- How might these insights lead to action to move the change forward?

For everyone

- What did I learn that changed my perception of how we might go about this change?
- What are our next steps in planning/implementing this change?
- Other comments, ideas, suggestions?