| **Demographics**  **Age: Sex: Position: CEO, Hospital Administration** | | | |
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| **Bit #**  **(Interview page/line)** | **Theme**  (values, view of others, range of perception, control, responsibility) | **Stage estimate**  (3,4,5) | **Evidence and tests of stage hypotheses** |
| # 1  (1/35-36)  (1/25-26)  (2/50)  (2/56)  (2/85) | Values | 4 🡺 5 | Jerry was keen to differentiate his approach to leadership development from the rest of the pack. He felt strongly that his method was an important advance over what is available “classically.” That he has defined standards that are different from the conventional ideas regarding leadership, and “doing what it is we are passionate about, what it is we must do” is evidence of movement beyond Stage 3.  His recurring mention of working with clients toward breakthrough or transformational change indicated a move toward Stage 5. He wanted to be an inspirational speaker, helping others move to a new level –“helping others learn from our cumulative learning… [and] get unstuck.”  Yet, he was pulled back toward his own well-established 4-ish identity and saw venturing into his new work as “taking the big leap off the cliff.” Developmentally, as he moves toward Stage 5, his stage 4 identity is at risk. |
| #2  (10/420-427)  (7/278-282) | View of others and  Range of perspective | 5 | Jerry referred to his wife, with whom he intends to work in his preferred future, as having skills that he would “never have in a hundred years, and vice versa.” He described instances where they have had different approaches in client settings and he found these differences helpful, even to the point of modeling conflict management for him and their clients.  This desire to work with people “who bring gifts that we don’t have” is indicative of a Stage 5 perspective. |
| #3  (4/168-169)  (5/194-195)  (6/266-267) | Control | 4🡺5 | Jerry was willing to trust what will unfold in the future, because he trusts the process of stepping off the cliff: “trust the wing set and go. It’s worth the risk of leaping off that comfort and past success cliff” (He wants to give up his Stage 4-ish identity).  He was very process-oriented, not looking at particular outcomes with his clients, but wanting to have the experience of “[going] deeper down, peeling the onion back, until they can get down to the core issue of…what’s in the way, what’s the false evidence, what’s appearing real.” Throughout the interview he talked about the process of working with his clients. This process orientation is a clear Stage 5 marker.  Vestiges of Stage 4 identity continued to appear when he imagined a conversation with a client: “we’re not going to recommend anything to you that we either haven’t personally experienced, led, or have some other experience that it works.” A person making sense from a Stage 5 perspective would leave open the possibility that through working together a new/better outcome might reveal itself. |
| #4  (8/351-358) | Responsibility | 5 | Jerry said “there’s a lot of “fed up” out there. People just saying, what do we need to do to get to a point where we can really talk about the people standing in the middle of the road. And do it in a safe, constructive… take us to the next level [way]”. He wanted to work with people to get them to that next level, whatever it is for them. He felt responsible for/driven to working with others to find a better way that neither has constructed. |
| #5  (9/380-393; 398-400)) | View of others | 3🡺4🡺5 | In a very interesting bit, Jerry seemed to move from Stage 3 to 4 to 5 in his view of others. He started out saying he’d be so frustrated with others who don’t agree with him or won’t veer off their own game plan (3-ish), moved through wanting to push them to do things his way (4-ish) and ended up saying “hey, maybe we’re out in left field” and could learn more (5-ish). |
| #6  (9/401-402) | Range of perspective | 5 | As a follow-on to the discussion in Bit #5, he said if he ever got stuck in one position he would want to be called on it and be given the opportunity to change his mind. This is Stage 5 evidence of being open to others’ viewpoints to change his own. |
| #7  (12/530) | Control | 5 | At the end of our interview, I asked Jerry, “If you ever engaged me as a coach, what would you want from me?” He replied, “Don’t sell me short on my fear crap, really push me hard in terms of, ok, if you can choose what you just shared with me, what’s in the way of choosing it and getting on with it.”  While I tended to believe Jerry was in Stage 4 going to Stage 5 throughout, this last bit was pretty clear indication of a Stage 5 meaning maker. He knew he has “fear crap”, was interested in working with someone else to arrive at something new, and was open to that someone else holding him accountable to get to a new place. |
|  | Overall stage estimate 🡺 | 4 🡺 5 | Jerry was clearly past Stage 3 because of his desire to follow his own heart into transformational work. His openness/desire to work with others toward that transformation is very Stage 5-ish. My only reservation in arriving at a full Stage 5 assessment is the sense that he may believe he has *the* answer, *his* answer, based on his own experience and beliefs. In SOI parlance, this is a vestige of a Stage 4 meaning making. |