

TOTAL VALUE FRAMEWORK¹

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1 Introduction

This material is about Total Value and High Performance.

Most initiatives in companies focus on a single element of value being delivered -- e.g. profitability, time to market, improving morale, increasing talent, reducing cost, increasing quality, etc. Or, if initiatives are seeking to deliver value across multiple dimensions, it is frequently the case that leaders and managers fail to communicate and act consistently toward delivering multiple elements of value.

Our view is that to achieve sustained high performance in delivering value, leaders need to focus on a number of things that are interrelated. This is frequently hard to do, but it is worth it. Otherwise, you may not see what's impeding success because your focus will be too narrow. You'll never be able to see your blind spots. You won't see the illusions you're operating under -- it's easier to maintain an illusion without the benefit/challenge of a multidimensional, multi-perspective view and data. Finally, you won't be able to include a sufficient range of involvement from a wide variety of individuals with different perspectives.

The framework we offer here is designed to help expose the illusions and blindspots which prevent leaders from seeing what might be truly impeding progress toward high performance, as well as to discover multiple points of leverage which you could use to amplify your organization's performance.

This also represents our personal experiences as leaders - we have seen many initiatives and leaders start well, but end averagely or worse, simply because they have been unable to effectively integrate across multiple perspectives.

2 Defining Value

Before we discuss the Total Value Framework, we need to be sure we are on the same page, working with a common understanding of what we mean by Value.

Work, production, etc can lead to multiple kinds of value. The customer values

¹ The work described in these notes has been directly inspired and influenced by the work of Ken Wilber, Robert Kegan, Chris Argyris, Otto Laske, and Bill Joiner. Specific resources are cited in the body of the text below.

the “product”, for particular features and functionality, and in terms of how well the product meets the customers needs and wants. Indeed, we do believe that the “Customer Defines Value”, as is the case with one of the five main principles of Lean Thinking.

Additionally, value is delivered to the owners of an organization, through profits, dividends, and rising asset values.

Lastly Value is delivered to performers, such as salary payments, but also the psychic or intrinsic rewards that people derive from their work and the environment in which they work.

So, overall, we want a framework that considers Total Value. Please note that when one leads in terms of Total Value delivered they are quite explicitly trying to deliver value to society, not simply to one part of society.

There is a rising concern and tradition on this point. Many leaders of companies today think in terms of not just their financial outcomes, but also the societal contributions they can deliver.

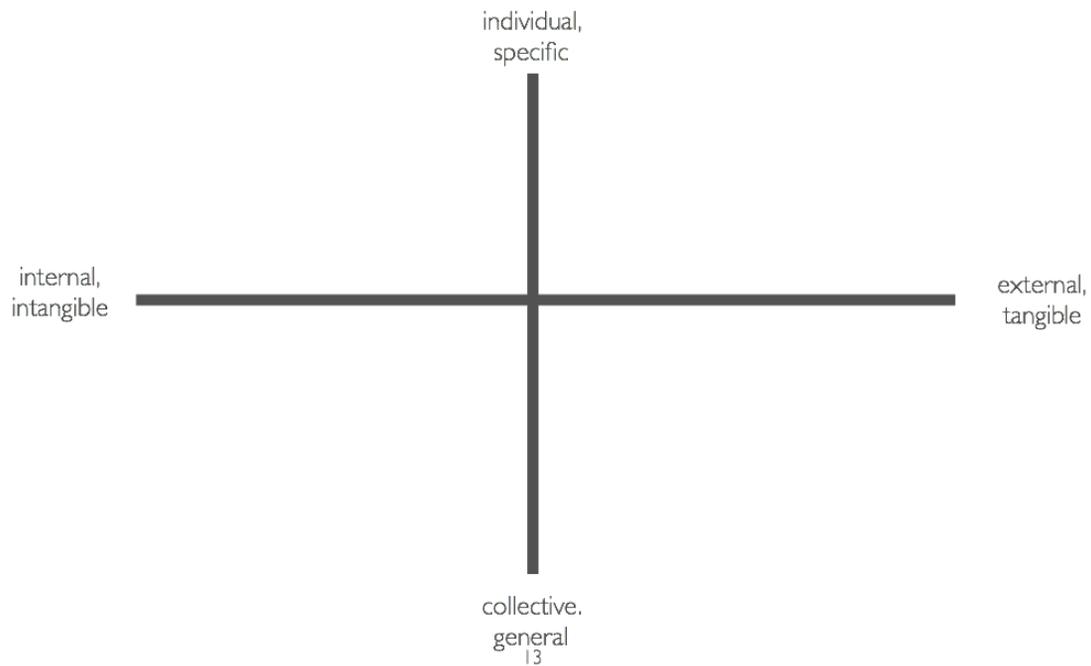
In this regard, we think a lot of what Jim Collins writes about in *Good to Great and Built to Last*, and Peter Drucker, and what Ohno and Deming have to say about how great quality transcends the product, and permeates the entire spirit of an enterprise.

3 Two Dimensions to Total Value Organizational Thinking

The seeds of our framework are based on Ken Wilber’s AQAL “quadrants” map. In this map, Wilber provides a way to capture the full dimensionality of any living system--whether a single cell, a sentient being (e.g. a dog or a person), or a larger social system (such as an organization--our primary concern in the work we are doing). A good introduction to Wilber’s work in relation to quadrants (and other related ideas) is his book *A Brief History of Everything*.

Our Goal with this conceptual framework is simply to have a way to organize the many factors that are part of an organization’s ability to function and produce its product or service. We believe this framework accomplishes that, as it basically covers the two spectrums of individual/specific to collective/general and external, tangible or internal/intangible (again, the foundation of Wilber’s quadrants map).

We think of this in terms of two dimensions. The first is that which encompasses the individual/specific versus the collective/general aspects of organizations. Organizations are comprised of individuals, with individual perspectives, beliefs, mental models and emotional composition. Their concerns are individual and specific. Meanwhile, we also encounter larger, collective groupings which have



their own intra- and inter- dynamics.

Meanwhile, we also face a second continuum: internal/intangible aspects of an organization versus those aspects that are external and more tangible.

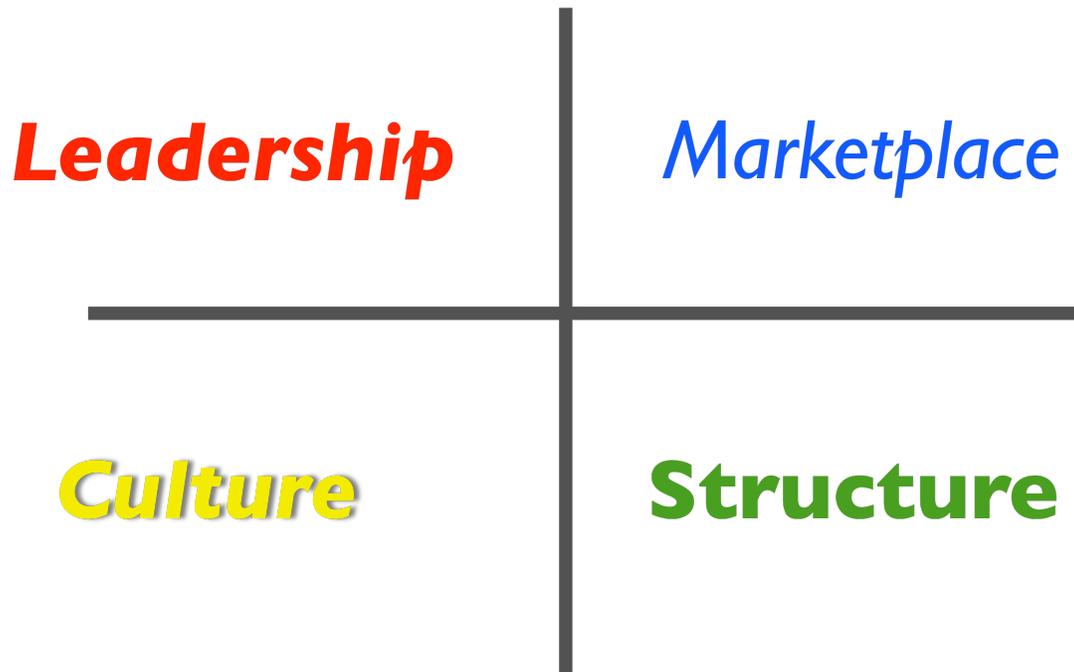
Putting these two continua together yields a four quadrant systemic way of modeling an organization. Each quadrant presents a particular **view** into an organization.

Consider, for instance, where you would place something like the price of galium arsenide used in microchip production? How about the performance rating system used by large corporations to assess employees. Or the beliefs people have about the value of diversity. In which quadrant would a person's motivation to learn fall?

Think of other aspects of an organization. Where might these land?

4 The Framework

In labeling these quadrants, we might come up with something like this:



Leadership, meaning either the leader, or the leadership group, occurs in the upper left quadrant. Here we are talking about the consciousness, and the thinking and emotional capacity of individuals. We are talking here about the internal capacity of leaders, but not necessarily only those at the top, since we've come to recognize that we need different kinds of leadership at a variety of levels and in a variety of areas of any organization.

Culture is used to label the collective values, beliefs, attitudes that make up the collective and internal quadrant.

Structures is used to denote the tangible processes, work methods, policies and practices that are generally found in organizations and can be regarded as tangible.

Marketplace is the collected external tangibles such as customers, suppliers, the product and services themselves that we can think of as being individual or specific to a particular company or industry.

Again, we're looking for a way of modeling how we might think about an organization in order to come to a total value view of its various dynamics and to

realize a way of embracing the needs of multiple families of stakeholders - customers, owners, associates. We are looking for a tool that helps us to think about all factors, not just the ones that we are predisposed to consider in business, etc. For example many people are measurement and quantify oriented, and tend to think of tangible and touchable things. Others are people and relationships oriented, thinking more about thoughts, experiences, emotions. This framework helps to identify all factors, and to arrange them in a logical way.

This model emphasizes the inextricable interconnection between individual and group and between internal (consciousness, experience) and external (observable behavior). For instance, we can't talk about individual consciousness within an organization without at some point addressing the cultural milieu (lower left quad), social systems (lower right), and the market aspect of the org in which that consciousness arises. Same for all of the other quadrants.

Our other point is that to treat one or another quadrant, or one or another half of the quadrants as self-complete and total, to the exclusion of the others, is to commit serious errors in knowledge which can have serious ramifications, socially, psychologically, physically. For instance, the old standard of organizational thinking regarded management as a science, and organizations as rational, with little emphasis given to the quality of individual experience, relationship, or social interaction. That has changed, since some time ago we started to recognize that these other 'softer' dimensions of organizational life also affect the bottom line.

For any framework to be useful, it needs to be robust, which is the point of being able to accommodate most items or issues. We are pretty sure that just about any thing we can think of related to organizations and how they perform can be categorized into these 4 basic quadrants.

We think the Total Value Framework is simple to remember, but elegant to use - i.e., you should be able to recall it quickly, but it should also be instructive and aid insight when used intensely.

Most importantly, over time, it should grow in familiarity and usage for the person who is adopting and adapting it for their use.

5 The MARKETPLACE Quadrant in Detail

MARKETPLACE

Value Chain	Rich	Poor
Change	High	Low
Scope	Broad	Narrow
Position	Strong	Weak

The Marketplace Quadrant is principally about the product and service itself, as well as understanding the external environment in which the product or service is delivered. So the radials here encourage thinking about the economics of the value chain, what is happening in the market with regard to consumer needs, changing technologies, or changing regulations, and they encourage consideration of the company's overall stance and position in the market place.

Much of the thinking here draws on the writings of people like Michael Porter and Clayton Christensen, both of whom have looked mostly at how industries evolve and how companies position themselves to achieve competitive advantage. Much of their work is economic in nature, concerned with understanding how factors such as input prices, economies of scale, competitive intensity, switching costs and substitution costs affect industry returns and company profitability. Porter in particular has delved into both industry structure and company activities.

Evaluating the Marketplace quadrant is very important, as it will provide both opportunities and limits with regard to what the organization can do in the other quadrants. So for example, if a company aspires to expand its Scope, it may very well need to consider changes in other radials and quadrants, and consider how those changes will impact overall organization performance.

Value Chain is about understanding the definition and nature of the "Industry" that the organization is part of - is it attractive, with growth, profit, ample learning and career opportunities? Or is it a low margin, low differentiation industry? What value is in it for the customers, shareholders and performers and where is that value being appropriated? Is it a potentially "rich" place? The nature of the

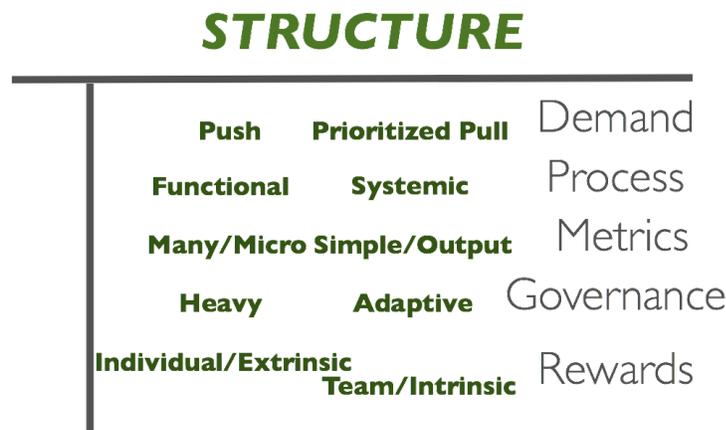
value chain has real implications for just what leadership can leverage as it pursues ways to design conditions for high performance/high value delivery.

Change considers typical market factors such as pace of technological change, formation of new firms, consolidation. This matters in that stable vs uncertain environments drive different challenges and opportunities for organizations, and drive different necessities in other radials.

Scope is about the complexity of how the organization is choosing to position itself along the scope of customer segments served, products offered, and geographies served. Again more or less scope will have different impacts and considerations for the organization's approach to achieving high performance.

Position is used to characterize an organization's stock of resources. Strong or Weak may be used to denote whether a company has access to financial and human capital thereby indicating the extent to which the organization can invest, take risks, and make changes.

6 The STRUCTURE Quadrant in Detail



The Structure Quadrant is defined as those systems, arrangements, constructs, policies that make up the other tangible aspects of how the company operates. Here we are thinking about activities that are found in all organizations, regardless of the product or service that they provide. So for example, the policies that make up the compensation (Reward) practices of an organization.

Our view on the Structure Quadrant is heavily influenced by Lean and Agile thinking, as best articulated by authors such as Womack, Liker, Poppendieck, Cockburn, who, for a given product or service, are focused on understanding how to deliver that product in a high quality, high value way.

Demand is about how customer demand for the product or service is managed. This radial is central, as it represents a major element of how an organization manages the interface between itself and its Customers. Here we want to understand the nature of demand - is it regular, episodic, variable? - and we want to understand how an organization manages the situation - does it constrain demand, does it stress supply, does it try to achieve some flow in the demand over a time period? How demand is managed does have a major impact on all other radials.

Process highlights how a company thinks about the interrelationships between activities. So we use the characterizations Functional and Systemic to get at the preference and capability that an organization has for managing its resources. Some organizations tend to put functional expertise as the main focus, and others put systemic management as a major concern. Functional concern leads to continued investment in organizational parts, and relies on negotiation and budgeting to align resources across a value chain. Companies that have a systemic bias tend to understand their service and product capacity better, invest more consistently in understanding overall process performance, and may plan and execute service or product development with more inclusiveness of all functions.

Metrics describes how a company measures itself, and what it does with those measures. Some organizations have many measures and metrics, and others have few measures. How a company chooses to distinguish between result and diagnostic measures, between quantitative and qualitative measures, and chooses to make judgments and acts from its measures is vital to understanding how Metrics define, limit, or expand what is possible along other quadrants and radials.

Governance concerns the very real element that organizational control has on a company. Are governance mechanisms (who decides, who is accountable, who acts, who monitors) clear, vague? Are they long lasting or ad hoc? Is there alignment between value creating chains and the governance of them? In essence, understanding how Governance is accomplished, and how it aids or restricts high performance value creation is many times a material element in high performance.

The **Rewards** radial is about how the organization establishes its contract between itself and its value creating performers. In particular, we are interested in the extent to which rewards are individual or team oriented, and extrinsic or intrinsically oriented. Elements to consider in the Rewards radial are congruence with other radials, holistic versus technical competence incentives, short versus long term orientation.

7 The CULTURE Quadrant in Detail

CULTURE		
People Development	Assets	Resources
Communication	Open	Closed
Learning	Continuous, Adaptive, Designed	Periodic, Reactive, Random

The Culture quadrant relates to the practices through which people interact, develop, and relate to the organization. This includes how people view communication, learning, and people development.

People Development relates to the intrinsic presuppositions according to which organizational stakeholders understand training and development of people. At one extreme, people are viewed as vertical 'resources' whose skills and competencies are optimized to fit the imperatives of the functional units in which people are placed. Training and development of people are intended to serve this vertically oriented optimization.

Under this understanding, technical training and development programs are reserved for programmers only, while things like EQ and conflict resolution are slated exclusively for managers and leaders. Moreover, only executive leaders have access to management coaching. At the other extreme, people are viewed as 'assets' wherein each person is understood as having a unique training and development path that is suited to not only to skills development, but to development of social/emotional and thinking capabilities.

Training and development programs are less vertically situated. Moreover, a great deal of attention is given to the developmental capability of individuals. Organizations are viewed as incubators for the development of high performance capability of all types and at all management layers in the organization.

Communication describes an organization's attitudes toward human communication. At one end of the continuum, communication is viewed as

'closed'. From this perspective, the purpose of communication is DESCRIPTIVE: to convey information from a source to a receiver.

At the other end of the continuum, communication is viewed as 'open'. From this perspective, communication orients shared understanding and commitment. Communication is itself an END, not merely a MEANS--the point of communication is aligned learning, discovery, and the co-creation of organizational futures.

With a closed model of communication, information is often owned and controlled in particular parts of the organization (for instance, at the top), and communication is either strategic or tactical: what to do and how. Closed models of communication tend to preserve command-control structures wherein leaders communicate strategic decisions down the chain to those who are to implement them.

Under an open model of communication, the leader effectively says: "I'm trying to get a kind of result: what do we WANT and WHY?". The implication is that rather than leaders trying to figure it out and then 'convey' it to followers (as would be the case under a closed model of communication), leaders and 'followers' work together to discover TOGETHER the WHAT and the WHY (and the HOW). From an open perspective, communication is THE vehicle of strategy design, for helping people get clear about their how they're thinking. Communication also is a way for reflective engagement with our thinking, to reveal the flaws and holes in our thinking. Ultimately, in terms of communication, a big part of what leaders are doing is the design of communication environments.

Learning addresses organizational attitudes toward learning and development. Some organizations perceive learning as periodic, reactive, and random. Training constitutes the bulk of proactive and formal learning situations (rather than coaching), and it is mostly concerned with skills and competence development within rather narrowly defined functional lines. 'Post-mortems' and 'lessons learned' happen after big breakdowns or large project completion junctures. They are intended to capture reflections, however only after the particularities of day-to-day work struggles have long since passed from memory. Moreover, they happen infrequently, and when they do happen they tend to have a high profile status.

Consequently, people are generally not skilled at participating in them and are not likely to be able to raise issues or challenges that may be too uncomfortable.

By contrast, other organizations take a more continuous, adaptive, designed approach to learning. They see learning as something that happens all of the time--learning is integrated into everyday activity--it is inseparable from day-to-day work (e.g. Daily standups, the distinguishing of impediments, or the practice of frequent retrospectives on Scrum teams). Formal training courses are fewer,

and instead there is more coaching (and coaching itself is considered to be an important skill to be developed at all levels and within all functions within the organization). What formal courses there are, they tend to be more experiential and they tend to deal with more holistic

organizational concerns, such as emotional intelligence, teamwork, leadership development (at all levels, not just at the top). Moreover, there are ways to see that the impact of training courses are demonstrably carried over into day-to-day work. Finally, work itself is viewed as a context for learning. Pilot activities and kansei help organizational players push the envelop, reveal otherwise organizational (and individual) dysfunctions, and help people develop particular targeted capabilities.

8 The LEADERSHIP Quadrant in Detail



The Leadership quadrant is concerned with individual developmental capacity. Among the things we care about here is whether people, across the various levels and functional silos of an organization, have thinking and socio-emotional capacity that is congruent with the demands and complexities of the given organization.

Those demands are given by the kinds of things we find in the Marketplace quadrant. But, they are also related to how far out on the radials within the other quadrants an organization aspires to be. When leadership (‘developmental’) capability is NOT congruent with the demands and complexities of an organization, various kinds of fallout occur, including overwhelm, underperformance, over-regulation, epidemic quality and production issues, and

so on.

What's hard about dealing with these kinds of organizational problems is that if leadership capability is not up to the level of the complexity of the problems underlying the manifesting issues, then most efforts to remedy those issues will either fail, or require unsustainable Herculean effort on the part of the most highly competent few.

Three radials help us get to the heart of what we're talking about here.

Thinking refers to the *cognitive* dimension in which individuals make sense of the world around them. There are three levels here:

1. **Simple Logic:** Simple, cut-and-dry logic. E.g. alcoholism is a function of an individual's lack of self-control and discipline
2. **Multi-model Logic:** Logic that involves simultaneous inclusion of multiple perspectives. E.g. alcoholism is simultaneously a medical, interpersonal and social problem the solution of which requires the synthesis of multiple perspectives
3. **Dialectical Logic:** Logic that necessarily involves antithetical and paradoxical perspectives. E.g. Stasis requires change (for instance, the tightrope walker who needs to be constantly making small micro-movements in order to maintain balance (stasis)).²

The implication is that as leaders--and, again, we're talking leaders at ALL levels in the organization--pass through toward more complex thinking capacity, their ability to deal with situations involving high degrees of complexity increases. Most large organizations require at least some number of people who are able to think dialectically--that is they have the capacity for what Robert Martin calls 'Opposable Mind'--the ability to think in terms of paradox and to see large, complex systemic interactions.³

If **Thinking** refers to how people make sense of their environment, we could say that SOCIAL/EMOTIONAL piece refers to how people make sense of their own experience, emotionally and socially. Another way of saying this is to posit the question: what can people BE with, emotionally and socially.

Researchers in adult development observe that, for each of us, particular meaning 'structures' determine how people make sense of their experience, and that as people mature and develop they pass from one structure to and through other more advanced structures. In our model we follow Robert Kegan's work in

² For a full discussion of these levels, see Otto Laske, *Measuring Hidden Dimensions: The Art and Science of Fully Engaging Adults, Volume II*, Laske and Associates, 2009.

³ Robert Martin, *The Opposable Mind: How Successful Leaders Win Through Integrative Thinking*, Harvard Business School Press, 2007.

identifying three base structural levels⁴:

1. **Socialized mind**: team player; faithfully follows others; seeks direction from above; is reliant on others for their sense of self.
2. **Self-authoring mind**: agenda-driven; ‘Leader learns in order to lead’; follows own compass, own frame of reference (not reliant on others); independent
3. **Self-transforming mind**: Meta-leader; able to dwell within multiple perspectives; ‘Leader leads in order to learn’; emotionally comfortable with uncertainty and contradiction; sees self as emergent within the context of critical interrelations with others similarly developed.

Again, the implication is that, while of course organizations need people at all levels, leadership requires a mix of self-authoring and self-transforming minds, and senior leadership, especially within complex organizational and business settings, require minds that are of the self-transforming sort.

It should be pointed out that research shows a pretty strong correlation between socio-emotional capacity and thinking capability. For instance, to be able to THINK paradoxically, one must also, to a high degree, BE comfortable with paradox in actual social and emotional situations.

This points to an important synergy between these two radials: Thinking, in the way we are describing it here, is not just of the abstract, rational sort normally attributed to thinking. Rather, it is directly related to our capacity to experience what we’re able to think. This is especially salient for organizational management and leadership, since organizational life requires a kind of thinking that is a thinking-in-action and that is a thinking in real-time with respect to situations that are prescient.⁵

The final piece in this quadrant is **Competence**. This refers to the skills and ability to function in one’s particular assigned role within the organization. For any given role there are any number of competencies and skills required, and that is what this radial points to. This quality includes ‘subject matter expertise’ though it is not only that. We have formulated this radial in terms of three levels:

1. **Incompetent**: Clearly is not able to leverage the skills and competencies necessary for an assigned role.
2. **Competent**: Has the basic skills, knowledge, and ‘savvy’ to carry out one’s role. However, such a level of competence can actually be detrimental; since

⁴ Robert Kegan, *The Evolving Self: Problem and Process in Human Development*, Harvard University Press, 1982. See also Robert Kegan, *In Over Our Heads: The Mental Demands of Modern Life*, Harvard University Press, 1998 and Otto Laske, *Measuring Hidden Dimensions: The Art and Science of Fully Engaging Adults, Volume I, Second Edition*, Laske and Associates, 2011.

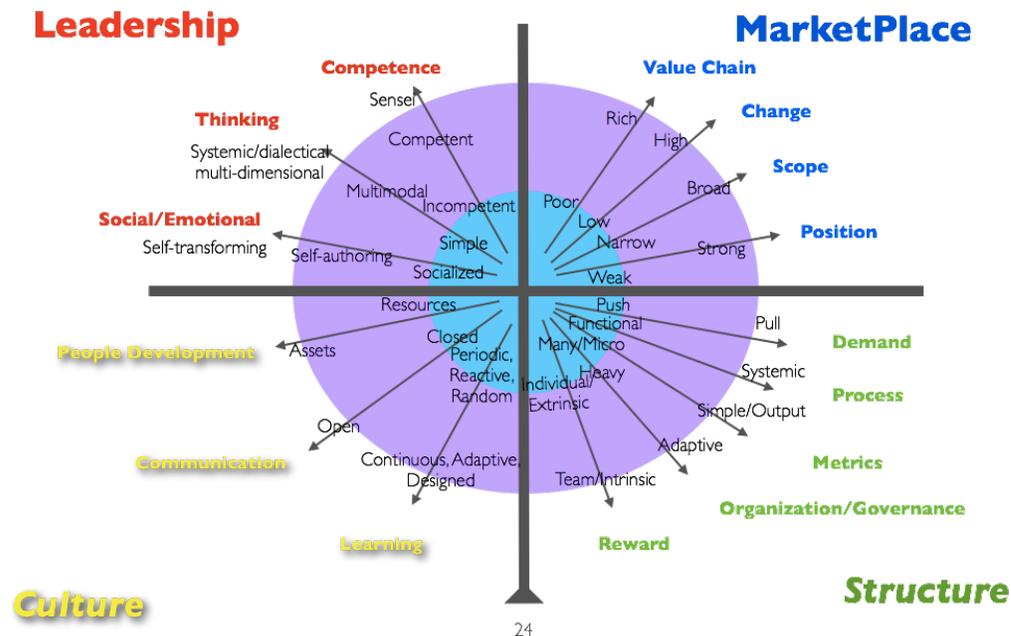
⁵ For more background on our thinking regarding *thinking in action*, you might consult Chris Argyris, *Knowledge in Practice: Increasing Professional Effectiveness*, Jossey-Bass, 1992.

it lacks capacity or range of variability, it often locks up into rigid patterns when faced with uncertainty or a need for greater adaptability

3. **Sensei:** Has the skills, knowledge and savvy to perform in one's role. However, more than this, the individual has the capacity to adapt his/her skills and knowledge in the face of uncertainty. When such a high level of competency is matched by similarly high levels of thinking and socio-emotional capability, this individual will contribute substantially to the development of high performance organization.

Finally, a comment is in order regarding COMPETENCE vs CAPABILITY. Competence, again, refers to skills, knowledge, and leveragable abilities in relation to a particular role. Most of the time, insufficient competence can be remedied through training and skills development. Capability, by contrast, refers to how one THINKS and what one is able to BE with, emotionally and socially. Competence alone is not sufficient for management and leadership roles (or any roles which require leadership capabilities, such as, for instance, the Scrum Master role, or a team lead role).

9 A Holistic View



In this picture, we are showing each of the factors discussed so far arrayed on the framework as a radial, arranged in the quadrant where they really define the things we look for and seek to improve in order to achieve high performance.

What we're saying then is that, for each factor, there are ways of thinking and doing things that tend to be more congruent with high performance agile organization.

Take the People Development factor. Here we either see people as plug-and-playable resources or we see them as assets to be nurtured and developed. We can see these factors play themselves out in subtle attitudes we might take. For instance, if we are building a CRM system, we might build a system that makes all of the decisions rendering telephone reps as little more than monkeys following very prescriptive steps. People as resources. By contrast, we might build a CRM system that provides deep information on the customer who is calling, providing a work context in which a phone rep is asked to access a vast repository of knowledge and insight, which of course has to be developed and built on top of higher thinking and social-emotional capabilities (which also have to be developed). In this last case, we have people who are adding value to an ever-evolving, ever-improving, ever-adapting organization.

In looking across the various radials we observe that certain attitudes are more congruent to high performance and organizational agility than others.

There are several inferences to be drawn from this graph, related to what we've been saying so far. First, what we are doing here is to identify the high impact factors, topics, and elements across each of the quads that we find to be significant relative to Total Value. These may not be the only ones, but they're among those that we have identified.

Second, we find there are particular attitudes, and ways of thinking and behaving that tend to more congruent with high performance than others, and these can be reflected as the outer edges for these radials.

Finally, and perhaps most importantly, this is a TOTAL, holistic, system -- the qualities reflected by these radials are interrelated in complex ways and in ways that are organic to the particular nature of your business and the Marketplace forces that define your company's 'raison d'etre'.

For instance, you may have noticed that in trying to lean out your process (along the Process radial, moving toward 'Systemic'), you find that people tend to be overly careful and protective or that they tend to be waiting for direction from leadership (Communication radial). Following this up a little more closely, you begin to have the sneaky suspicion that much of you middle management are fearful of saying or doing the wrong thing (on the Social/Emotional radial, they are stuck in the 'Socialized' sense of self, at which stage people over-identify with particular groups or social 'others'). Meanwhile, your leadership team has

identified new markets, calling for movement into high Change Marketplace.

The interrelations of these factors play a far bigger part in your capacity to succeed than any single factor alone.

Now we want to observe that as a framework we are not being prescriptive, and we are not saying that there is a distinctive place to be - instead, we are saying that if you use this framework, you will be able to assess, characterize any organizations current state along each of these radials, and from that you will be able to derive insights explaining current performance, and hopefully pointing to avenues for improving or sustaining performance. More than that, you will start to identify actions that are systemic throughout and around the framework, opening up possibilities that you may have not seen before.

Having said the above, we are pretty sure that organizations that are able to move to the outside of the framework have a better chance of achieving and sustaining high performance, but more on that later.

Another note - this is a generalized framework, and we believe it should be made specific to an organizations context. So for example, lets assume that someone is using the framework for a company internal organization that has internal customers - then obviously, one would adapt the marketplace quad to fit that situation, possibly thinking differently about how much of the value chain to consider in evaluating things like position, scope and change. However it is easy to see that even in the internal context, understanding what internal customers need, how it is changing etc, is still important.

10 What is This Really About?

As leaders, we architect, design, and implement a system of conditions that lead to high performance. Our “Design” is captured in numerous things: Vision, Mission, Values statements...Business Plans...Training curricula...Quarterly reports...Management by Walking around...Mentors...Shared histories...stories...Language

Ultimately, this is about designing your organization *holistically*.

11 Leadership Implications

Adaptations and improvements in culture, structure, and product quads engender conditions in which new forms of agile leadership can emerge. We can't predict where these will come from; however, as they emerge, people become increasingly able partners and leaders--across functional areas (laterally) and

across management levels (hierarchically). Example: Jason Bane and the engineering team. Metaphor: senior leaders tend to the soil in such a way that the right kinds of plants can grow.

It is important to note that those whose thinking capacity is Simple will have a very different perception of unfolding organization than those at at Systemic/ Dialectical. For instance, *Simple* thinkers will likely have a hard time with the entire premise of this model: They dwell in the language of 'Yes, but....'. On the other hand, those who dwell at the level of Self-Authoring will see things strictly in terms of their own perspective: for instance, the question of motivating others will be based on what motivates THEM--any other approach will be dismissed. They will want to see the organization evolve IN THEIR OWN IMAGE. This is incredibly important to bear in mind, and is why leaders need to be willing to look at and evolve their own meaning- and sense-making constitution, and why that evolution is such a critical part of any meaningful agile adoption.

Another point here is that leaders must recognize their developmental shortcomings and match the level of ambition in their organizational transformation to their own limitations. I would assert that leadership of an organization-wide agile transformation requires a minimum of Achiever level capability--Experts will be way too focused on the technical aspects (e.g. are we doing Scrum right, etc.), and Conformists should not be senior leaders anyways (they will collapse the first moment they encounter disagreement from peers). The inability to self-reflect is why it is so often the case that senior leader involvement with an Agile adoption can be a serious IMPEDIMENT.

This is one reason why organizational assessment is not enough: we need to know how leadership understands and construes the information and insights which an organizational assessment might present.