



TRANSFORMATIONAL JOURNEY WITHIN A CORPORATE “ECOSYSTEM”

“The organization is a living ‘ecosystem’ that breathes and creates its own path to awareness”

Ana Claudia Goncalves

CEO Global Financial Services Company

(Portugal and Mexico)

This case has certainly been a rewarding learning experience for me. I am very grateful to have had a living lab that, despite the scarcity agreements and rules in its organizational structure, implemented initiatives that I had not seen in all my years of working with organizations. This was possible because the company incorporated the transformation process into the day-to-day activities of the corporate world.

This group was at a very low HV level, as it completely focused on concrete outcomes and objectives, it had several efficiency issues that required significant improvement and over time they have tried some initiatives to consider individual soft skills for performance. On the surface, it might appear as though there was not much of a point in exploring and researching how to evolve this group; however, its director was an unusual leader who had a vision of HV third circle (possibilities/light). She had also just arrived to Mexico after attaining a very successful evolution in an associated group in Portugal, so one can imagine the tremendous learning potential. Furthermore, when I asked her what she expected to see at the end of the process that we were starting, she answered something I had never heard before. She said, “In the end I wish we could give people tools that will shape them for life, because if they are doing well in life and they decide that this is where they belong, then they will deliver their full potential and that will be wonderful. If they decide along the way that they can contribute much more somewhere else, then that will also be wonderful”. It is uncommon to find a leader who both sees the infinite potential in human beings and belongs to a group that is at the lowest levels of Harmonic Vibrancy.

This organization is dedicated to developing banking software and provides system integration services, is part of one of the largest and most important corporations in the banking industry. The corporation started to undergo a significant structural transformation; it changed its business model, its type of relationship with corporate offices, it created new areas and groups, etc. These changes started in Europe, and Portugal was the first country that successfully introduced the new business model and delivered results. Upon introducing the model in Portugal, the group director moved to Mexico for a new implementation. The transformation process in Portugal already had a life of its own. This director was in a corporate organization of this kind because she realized she could apply everything that she told her clients to do when she was a consultant and experience transformation from the inside.

From my perspective, the essence that makes this transformation different from others is the following:

© **Organizational Ecosystem (Perceiving Harmony)** – In the words of the director, “the organization is a living ‘ecosystem’ that breathes and creates its own path to awareness”. Several important elements regarding organizations as ecosystems are:

- Patience and trust – The path is the learning experience; the “ecosystem” sends us signs of its evolution and tells us what it requires to keep evolving. Listening to the signs often implies stopping and waiting. In that “silence”, new intuition, imagination and inspiration emerge.
- Developmental transformation – Generating different spaces and moments according to group needs. The next section of this article explains the stages. The first programs sought to make people more aware of their individual and team dynamics, and then they expanded to discover how to work beyond the organizational structure’s

established limits. At the beginning, it was fascinating to observe the spark in the eyes of individuals who bravely volunteered to engage in several key moments, or to witness the participation of individuals who were chosen because they were already on the path of personal development and were willing to broaden their mindset.

© **The Transformation of individuals and teams as the evolution engine (starting evolution from the Individual and Relationship with Others Axis)** – Again, the director voice “If we prepare people for a better future, sustainable outcomes are a consequence of the process of change. The team motivated the change by actively engaging to define work processes that the corporation had not yet defined”. Two main pathways were followed during this process:

- Coaching was a key instrument in both processes and it consisted of two parts: (1) Individual Executive Coaching for performance on the individual level and (2) Team Coaching for performance on the team level.
- Generating self-learning spaces that considered the five axes was another key instrument. Although this may seem very complex, they were actually simple, hands-on and

“When I joined the company, my mission was to provide support in expanding and activating collaborators’ potential through an Executive Coaching Program. I lived the transformation process indirectly –through the experiences of the managers whom I accompanied during the Coaching program– and I was gladly infected by the vibrant energy of ideas, innovations and changes that made my work even more exciting. I am an Executive Coach and throughout my 10 years of experience, I have never encountered people like the ones in this company. They were inspired by a shared vision; they were constantly challenged to expand their limits, to overcome their fear and apprehension of failure, to dare to question the “it has always been this way” mentality, and to discover and awaken optimizations and improvements that lay dormant in their organizational potential. The transformative wave caused individual and collective impacts that were highly relevant to increase the organization’s development and form high performance teams. These teams had increasing levels of independence, proactivity and productivity, and their members challenged both their professional and personal development processes, as neither can advance without the other. Everything seemed possible. Reluctance, apprehension and obstacles were also part of this road, but the wave of change was stronger and it did not stop generating more and more agents of change who were happy and resolute to make a difference.”

Aida Chamiça
MCC Executive Coach and Driving Force in Portugal

practical things; the big difference was that they were consciously designed to facilitate spaces and experiences that enabled people to recognize certain behaviors, self-limiting conditions and even fears. Most people clearly perceive that there were a lot of individual evolutions but group evolution is not as clear.

- ④ **Aligning the essence of the organization with the Group's Organizational Model (expanding Levels of Perceived Reality)** – The transformation was elegantly embedded into the corporate structure, which enabled it to be lived as a continuous journey. Several “expansion” processes formed part of formal corporate training, executive or structural programs and were designed to connect them to outcomes. Examples of this were the coaching and learning communities programs. In other cases, the structure was redesigned with different indicators and it was aligned with Corporate Group requirements in order to make real contributions to the business results. “Sigma” is an example of an innovative indicator that measures collaboration within teams and are, it is the variance of individual outcomes in a team; this indicator measures the variance of individual results in a group, and therefore assessed the outcome of each individual in relation to the outcomes of the rest of the individual group members, and it quickly and easily allowed identifying groups with high levels of collaboration.

Although designing expansions while respecting the core structure may seem restrictive, I believe this is the strongest innovation; rather than going against the rules and structures of this type of groups, the target was to understand them and design spaces and moments that enabled the structure to reach its full HV potential. It seems as though the evolution of these groups does have a limit, yet they have a much greater potential of experience than the present level of experience in most of them. These groups can become very successful on the things-matter level (concrete objectives and outcomes) and they can generate alternate structures and dynamics that allow the motion level (development, flows) to be experienced in the organization.

- ④ **A team designing the experience; “We only create if we believe”** – In both countries, there was an internal team that designed the experiences with external advisors, these were the guardians of evolution; for several team members it was a mindful role and for others it was not. Along the journey, team members became more aware of the particular gift they brought to the organizational environment. In Mexico, I had the opportunity of designing many programs with one of these agents of change and it was an important experience for me, it broadened the vision to other levels and allowed the organization to explore other paths. Part of the intention of this process

“The formal role of my participation in the company's transformation is as the person responsible for knowledge management and training and development. However, in practice it has been much more than that. I contributed to a company that expanded possibilities not only as professionals, but also as individuals as integral beings... Personally, after travelling on a road of professional and human transformation, I have encountered the expansion of my possibilities in front of my partners and the community that surrounds me; I have enjoyed being a catalyzer of this vision and an active and very close participant..”

Ricardo Gallardo Villar

*HHRR
Designer and Co-Host of the
Transformation in Mexico.*

was to generate awareness within this team so that it could envision these transformation experiences with increasing mindfulness in any setting, which evidently encourages a rise in the harmonic vibrancy of the world.

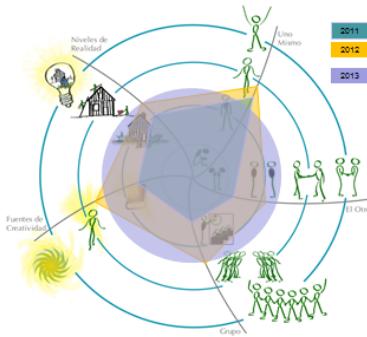


Figure 1.
Collective Evolution.

THE PATH TO EVOLUTION

Most of the article focuses on Mexico because it is where the HV assessments were carried out, but there is an interesting parallelism between both countries.

The Mexican adventure observed certain clear elements and evidence of evolution. Figure 1 displays the results of the survey conducted to the Mexican group (approximately 75% of the total members of the group answered the survey, between 150-160 people per year). One can observe that this group started on levels of significant scarcity and then began to change its questions to shift to the second level. This graph shows what was emerging in the group, what its aspiration was and what individuals could sense. Further on in this article I will describe what this means and where the evolution of this group stands in the comparative Agreement Maps of 2010-13.

In Portugal's case, our hypothesis is that the group's level of harmonic vibrancy at the beginning was probably already a little bit greater than in Mexico, which allowed for a smoother transformation. Both collectives started from the same scarcity corporative rules, however, maybe one of the elements was that there were more people ready, with more questions in one country than in the other, this is still a exploration to do.

In this evolution, two parallel pathways are evident; one is the organizational transformation and the other is the cultural transformation. During the last phases, both of them were already very integrated. The phases are similar in both pathways. Let us understand the phases of transformation in both groups as defined by the leader and a few stories lived within them (see Figure 2).



Figure 2. Phases of the transformation.



THE NEW MOON OF PREPARATION

Cultural Transformation: Facing the Shadow – At the beginning, designed experiences had two purposes: (1) to expand the awareness of what individuals were doing and how they were doing it and (2) to generate experiences that would enable individuals to realize that the limits of what they could do were movable. A particularly important addition for this path was the Executive Coaching Program.

Regarding individual experience, a lot of them were confronted with their way of doing things, with unconscious cultural customs, and with self-imposed limits. A specific example that is worth sharing is the case of a person who volunteered to provide an hour and a half session with the company. Around 100 people typically attended these sessions (one-shot sessions). This person was reserved and quiet and it was a surprise that he raised his hand.

The volunteer was given a special preparation and all the support he requested before the session to make him feel as comfortable as possible. During the session he was extremely nervous, he had never been in front of so many people to deliver a dynamic session, his face and forehead were sweaty but his voice was firm and he created an environment that planted a seed beyond the dynamic he facilitated. The strongest impact was that the participants perceived that they were also capable of standing in front of the group. It was a subtle but powerful message that implied questing their limits. I returned to the company a week later and ran into this volunteer. When I greeted him, I noticed a spark in his eyes that I had not seen before. Afterwards, several people mentioned that they noticed a change in him and in how he related to others.

Organizational Transformation: Exploring the Field – To create a new organizational structure, an important part of the process was to know what it already had and did not have. Processes, procedures, roles, responsibilities, internal communication mechanisms, training plans, among others, were starting to be redesigned. This led to several significant organizational outcomes that motivated the next steps. A few important achievements were: the Knowledge Management Model (skill database), formalization of the demand process, SLA project launch, renovation of the assessment process, recovery of continuous improvement projects, creation of the CSA unit, implementation of the new organizational structure divided by families (Roles, Responsibilities, Objectives, Governance Model, Processes). The structural changes in this first phase were very important to strengthen the things-matter level.



THE CRESCENT PATH

Cultural Transformation: Awakening Spaces for Reflection – Programs that enable people to be more aware of how they experience the transfer of knowledge and change are designed in this phase to inspire change and a sense of belonging. There is a shared dream of being an important unit of contribution for the group. There is a newly

created focus on excellence, quality and innovation. The Executive Individual Coaching and Leadership Coaching Programs continue as the foundation of the transformation process.

Organizational Transformation: New Organizational Structure – Structured communities of knowledge are generated according to skill groups and they are assigned to projects. The focus is on global management projects that are clearly committed to quality delivery and cost control. Developing key capacities of contribution to the Group and aligning to the organizational model as a gateway for local units to provide real contributions are priorities.



THE CRESCENT LIGHT

Cultural Transformation: Expanding Limits –

In Portugal, work groups present their outcomes; there are clear and concrete business outcomes and team empowerment is noticeable in many settings.

In Mexico, community expansion continues and starts to generate new possibilities that individuals would have otherwise thought were impossible. Programs focus on allowing people to live experiences; have real-life learning experiences that will expand their own perception of what they can achieve, of their skills, capacities and talents; and dare to do things they would have never imagined. Several participants commented that, “I learned to unlearn, also to unlearn my fears and worries about what other people will say”, “leaving your comfort zone generates personal growth”, “I used what I learned from the training and gave two school conferences; one was for parents and the other for high school students”, “I discovered that the impossible is possible”. Another important result of these designed programs is that in many cases they had direct applications to the business, to the outcomes and to efficiency, even if the learning experience appeared to target other areas. The Team Coaching program begins its journey. In addition, a new generation of young talent with high potential is in preparation to energize the process of change.

Organizational Transformation: Consolidation of the New Structure – Corporate tools are implemented; processes, procedures and corporate guides are consolidated; new Quality Excellence areas are formed (certification); the corrective investment approach is replaced with a preventive investment approach; contributions to the bank are made through the Systems Plan as a strategic technology partner.

“I have become aware that wellbeing is not something that must come from the outside, but rather it is a right and an obligation that I have towards myself and it is related to self-esteem. I have learned that, being close to people who have a similar vibrancy, it is possible to create synergy and attain important objectives. Without losing sight that every person makes their own decisions and is a co-creator of the world, and accepting that there are things that are not in my circle of influence, I have realized that the key to changing the world around me is in my hands.”

Jose Noé Gomez Rivera

Application Back Office and Driving force in Mexico

"I remember when I joined the company towards the end of 2007; it felt as though there was a certain nervousness, anxiety and even awkwardness in the air. One could perceive that something new was underway. The uneasiness later turned into a sense of acknowledgment and commitment. Acknowledgement and pride in the opportunity to participate in defining the company's destiny. For others there was also a sense that their superiors trusted them to take on new responsibilities, to challenge, better and believe in themselves. The created energy, motivation and sense of mission were astounding. Today, what was originally established as a vision for the future of the company in the 2007 - 2010 period is now a reality. The company's horizons have expanded and they will never be the same again. Thank you; it is a privilege to be part of that power!"

*Susana Gonçalves
PMO Team and Driving Force in Portugal*



A FULL FORCE THAT FULFILLS

Cultural Transformation: Living Real Possibilities

– In Portugal, individuals receive awards, teams receive acknowledgement, and there are programs to support change on an organizational level (MAIS –MORE– stands for Improve, Act, Innovate, and Overcome). In Mexico, communities grow and alternative programs emerge thanks to direct proposals made by professionals. These programs, carried out with their drive, generate acknowledgment that transcends the organization; associated companies are involved (the banking production company, the corporate bank that they were a part of, and the supply factories) as well as other groups, such as IBM, which provided support to develop these ideas and programs. Several communities maintain supporting mental, physical and emotional health activities, which they lead completely. For example, a group of individuals in the company organized and carried out Chi Kung exercises at noon to increase the

staff's energy and improve their posture. This initiative came exclusively from the members of the community.

Limits expand even further and transcend the organization. The programs seek to integrate the talents and gifts that the individual members of the company can contribute to each other and the community. In formal workshops, many people raise their hands to share personal knowledge and skills, which are not directly related to the organization's "core business" (for example, employees provided laughter therapy workshops and safe motorcycle driving workshops).

Organizational Transformation: Increasing the Performance Level – There are quick wins in efficiency and productivity. The organization's role shifts towards coordination and strategy. The group carries out relevant and critical applications for the Bank. The Group can transition into the next phase, as it attains the desired Alhambra readiness level.

In the Agreement Maps (Figure 2) created for the Mexican experience, one can observe the differences between each group's practices from 2010 to 2013. Several implemented initiatives enabled people to envision a level higher than the operative one (things/matter). The focus on individual growth and development produced greater quality, productivity, business contributions, etc. In some cases, there were clear and shared rules, indicators and commitments.

Throughout this process, at least two groups with considerably higher vibration levels emerged, one is a complete area and the other is a small work group.

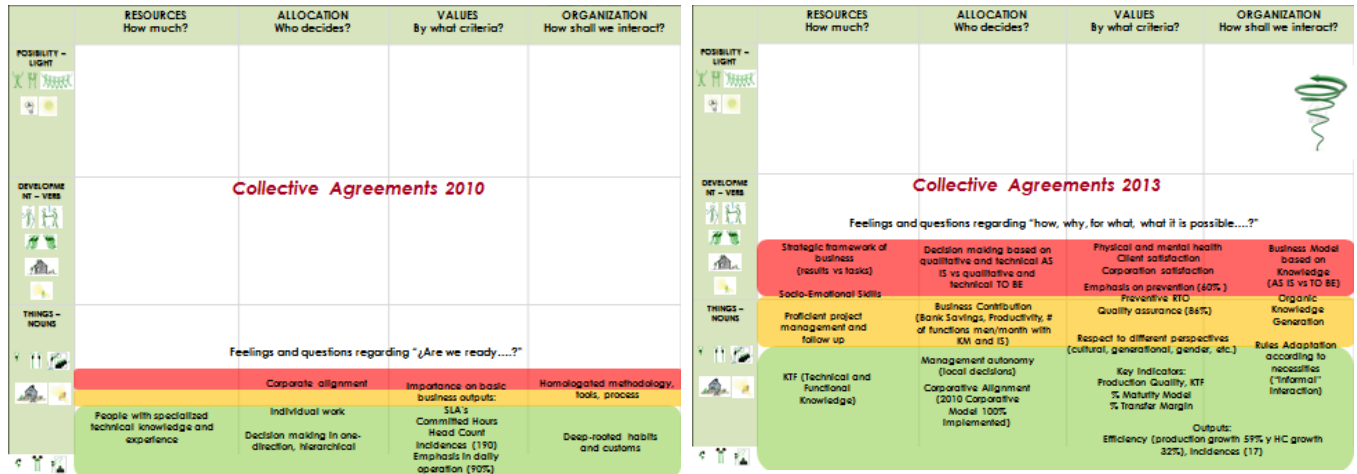


Figure 2. Agreement Map – A comparison between 2010 and 2013

Many of the efforts from the past three years had the purpose of strengthening the things-matter level and allowing the group to take the next step towards evolution. There were many questions at the individual level, although individuals have not yet made a clear connection as to how the development and their questions allowed the group to evolve. Sharing many more agreements is still required in order to reach the level that we believe this kind of group can reach. Among those are sharper strategic vision; a more integral decision-making process; sharing that, aside from program development, the wellbeing of individuals is also very important; changing the perception of the consumer and corporation, etc. There is a sense that there remains a lot to be done and this is certainly true. Part of what is preventing individuals from realizing the significance of their evolution is precisely that there is still a lot of work to do; many individuals have not yet noticed that their intuition and questions regarding the things that need to be done is proof of their evolution as a group.

However, as I mentioned at the beginning of this article, this kind of group normally functions at low levels of HV, with lots of scarcity rules, as shown in the 2010 Agreement Map. We were able to prove that these groups can function at higher levels; the experience between the 2010 and 2013 group agreements is radically different.



THE WANING PATH – Are We Resilient?

In October 2008, Portugal's challenge changes and all the developments achieved up until that moment are questioned; local improvement actions are suspended,

including the pilot Mentoring Program that was based on the concept of constellations. Then, the following question emerges, “Are we resilient?”, and the answer by the end of this year is “YES!!! We are resilient”. Implementation is a reality that does not affect production quality or anything else built in the “ecosystem”. The team accomplished significant improvements in production quality and remarkable acknowledgement.

In Mexico, the waning path starts in 2014 with many changes and a stronger impact on the “ecosystem”. The Corporate rules constrains even more than before. We will wait and see if the “ecosystem” can be maintained and if it can support the essence of what was learned.

“The company went from being an informatics department with one local client, to a service company with several Group clients in different countries around the globe. Company changes expanded business horizons and even transcended the horizons of its collaborators and my own. I lived moments of “inner” change; I managed the change together with the company’s teams of collaborators, who are the true agents of change. Throughout the years, I was able to explore different approaches, I gained knowledge and experience; I provided encouragement, creativity, answers, time, and energy. The way we attained change remains in the company’s DNA and in mine.”

*Rute Silva
Interim Organizational Development
Consultant and Driving Force in Portugal*



THE NEW PATH – Creating the Space for another Cycle in the Ecosystem.

The ecosystem in Portugal is still alive and successful; it continues to deliver results and maintain the agreements established during the transformation. Many catalyzers that were a part of that design are now members of other groups that are currently designing new paths and transformations.

In Mexico, we have to wait for what will happen in 2014 and be patient to see if the “ecosystem” is able to withstand the changes it went through when it was not completely ready and now that several motivators are leaving the organization. If the “ecosystem” remains with sufficient liveliness and drive, my hypothesis is that it will be possible to resume several agreements that had been in process of development, although the evolution will be very, very slow and will probably not reach its full potential. It is possible that after the “earthquake” and after reengaging as a group, there will come a period of stability where the group will maintain however much or little it managed to preserve.

What I believe will happen is that the individuals who had a greater transformation and gained more awareness in this process will become catalyzers to a greater or lesser extent, regardless of whether they decide to stay or go elsewhere. Several of these motivators emerged naturally during the process and are not yet fully aware of the impact they had, but they are getting close to this. I think the transformation of this group, which is involved in the corporate giant world, is a great achievement because it sought to make an impact that transcended the limits of the organization.

So let us wait and hope for the best...

