

Co-funded by the
Erasmus+ Programme
of the European Union



Empowering of School Boards

2019 – 2022

Organisation Development in Estonian schools

SECOND MODULE

03rd – 07th of February 2020

TRAINING BOOK



Participants of the Saaremaa project



1. Aivar Haller

Participant, Mentor,
Vice-President of European Parents' Association
+372 516 2211; aivar@haller.ee



2. Dr. Anita Reinbacher

Trainer, Business Consultant and Coach
at Trigon Entwicklungsberatung
anita.reinbacher@trigon.at



3. Anja Köstler

Trainer for Mindful Leadership, Organizational Consultant,
Management Trainer, (Conflict) Coach and Mediator
at Trigon Entwicklungsberatung
+49 89 24 20 89 90; anja.koestler@trigon.de



4. Anneli Meisterson

Participant, Manager of Kuressaare open youth center Noortejaam
+372 5347 0011; anneli.meisterson@kuressaare.ee



5. Anton Teras

Local participant, School Board Head of Saaremaa Ühisgümnaasium
+372 505 6566; anton.ik@tt.ee



6. Anu Sopanen

Head of training division, Institute of Educational Leadership, JYU
+358 5036 10984; anu.m.sopanen@jyu.fi



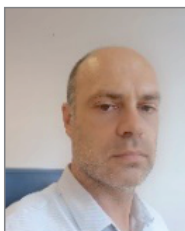
7. Arja Krauchenberg

Foreign participant, Linguist, President of European Parents' Association
+43 650 7004448; arjakrauchenberg@euparents.eu



8. Arvydas Augustaitis

Foreign participant, Consultant of European Parents' Association
+370 6869 7747; arvydas@augustaitis.lt



9. Boštjan Bobič Zabreščak

Foreign participant, Vice-President of European Parents' Association
+386 5136 6450; bostjanbobic@euparents.eu



10. Hanna-Kaisa Pekkarinen

University teacher, Institute of Educational Leadership, JYU
+358 401 932 600; hanna-kaisa.hk.pekkarinen@jyu.fi



11. Eveli Nõgu

Local participant, School Board Head Pihlta LA
+372 5340 5620; evelile@gmail.com



12. Harald Jäckel

Leading Trainer of Program, Consultant for organizational development
+49 171 176 2032; harald.jaeckel@trigon.de



13. Helle Kahm

Deputy Mayor of Saaremaa Municipality
+372 515 7198; helle.kahm@saaremaavald.ee



14. Harli Uljas

Participant, senior consultant in regional and business development
+372 511 0726; harli.uljas@gmail.com



15. Hillar Lõhmussaar

Participant, Board member of Estonian Parents Association
+372 527 1597; hillar.lohmussaar@lkf.ee



16. Ingrid Leemet

Local participant, School Board Head of Kärla PK
+372 528 6107; leemet.ingrid@gmail.com



17. Jürgen Mets

Participant, Service Designer, Researcher
+372 552 2821; jyrgen.mets@gmail.com



18. Kersti Kirs

Local participant, Study Leader in Kuressaare Gümnaasium
+372 522 9936; kirs.kersti@gmail.com



19. Kristiina Esop

Administrator, Consultant of Management
+372 5665 8505; kristiina.esop@gmail.com



20. Kristiine Järsk

Local participant, School principle of Kaali PK
+372 521 7023; kaali.kool@saare.ee



21. Madis Altroff

Participant, entrepreneur and therapist
+372 509 3353; madis@allikas.ee



22. Madis Kallas

Mayor of Saaremaa Municipality
+372 506 7383; madis.kallas@saaremaavald.ee



23. Mai Peetsalu

Participant, Teacher
+372 506 6971 ; mai.peetsalu@gmail.com



24. Maiu Raun

Advisor on Early Childhood Education of Saaremaa Municipality Government
+372 452 5066; maiu.raun@saaremaavald.ee



25. Maris Rebel

Local participant, School Board Head of Kuressaare Gümnaasium
+372 5698 6981; maris.rebel@gmail.com



26. Martin Tiidelepp

Participant, management consultant and researcher
+372 516 7897; martin.tiidelepp@avatudring.ee



27. Meelis Kaubi

Education advisor of Saaremaa Municipality Government
+372 452 5063; meelis.kaubi@saaremaavald.ee



28. Meeri Krass

Young participant, Estonian Academy of Arts
+372 5621 8441; meeri.krass@gmail.com



29. Mette Hagensen

Foreign participant, trainer of school boards,
professor in economics and marketing
+45 31 71 63 78; mette@hagensen.dk



30. Mika Risku

Researcher, Head of Institute of Educational Leadership, professor of JYU
+358 400 247 420; mika.risku@jyu.fi



31. Moona Mengel

Participant, Teacher
+372 5692 6543; moonamengel@gmail.com



32. Märt Aro

Participant, Educational innovator, Co-founder of DreamApply
+372 5341 5761; mart.aro@dreamapply.com



33. Paul Priks

Participant, Teacher
+372 514 2362; paul@vaanjarve.ee



34. Riho Kokk

Participant, Teacher
+372 5668 9629; riho.kokk@gmail.com



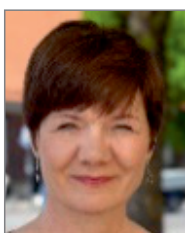
35. Riina Saar

Local participant, School principle of Pihtla AL
+372 516 8446; pihtla.kool@saare.ee



36. Sigrid Sepp

Young participant, Storyteller
+372 5663 0170; sigrid03sepp@gmail.com



37. Sirje Ellermaa

Local participant, School principle of Kärla PK
+372 512 7899; sirje.ellermas@kpk.edu.ee



38. Taavet Borovkov

Young participant, Tallinn School of Economics
+372 5565 4123; taavet.borovkov@gmail.com



39. Taavi Tuisk

School Board Head of Kaali PK
+372 516 2234; taavi.tuisk.est@gmail.com



40. Tiit Urva

Participant, Consultant of organizational development
+372 516 6537; tiit@arengukulg.ee



41. Toomas Takkis

School principle of Kuressaare Gümnaasium
+372 505 6094; toomas.takkis@oesel.edu.ee



42. Tuija Ukskoski

Researcher, Department of Teacher Education of JYU
+358 408053376; tuija.ukskoski@jyu.fi



43. Tõnis Tamme

Young participant, Tallinn School of Economics
+372 5354 1642; tamme97@gmail.com



44. Urmas Treiel

Head of Education of Saaremaa Municipality Government
+372 516 5788; urmas.treiel@saaremaavald.ee



45. Valerie Gardette

Foreign participant, Vice-President of European Parents' Association
+33 6 76 28 79 91; valriegardette@euparents.eu



46. Viljar Aro

Local participant, School principle Saaremaa Ühisgümnaasium
+372 509 4981; viljar.aro@syg.edu.ee



47. Ölme Salumäe

General Education Advisor of Saaremaa Municipality Government
+372 452 5067; oilme.salumae@saaremaavald.ee



Anja Köstler was born in Munich/Germany in 1961. She graduated in Social Sciences and Adult Education. Her work experience includes 15 years in management functions in Germany and USA.

Additional qualifications: mediation /conflict management, organizational development, HR-development, communication - intercultural competence, mindfulness and mindful leadership. Since 2001 she is a certified mediator BM® and trainer in mediation BM®. She worked as a self-employed consultant, trainer and mediator since 2009 and joined Trigon Munich as a senior partner in 2017.

She lives close to Munich, is married, two adult children.

Her interests: literature, music, theater, swimming, sports, travelling

E-Mail: anja.koestler@trigon.de

Current focus

- **Conflict Management / Mediation:** individuals / teams / large groups
specialties: cross-hierarchical conflicts; management and works council; conflict-coaching
- **Change Management / Innovation:** intelligent structures of organizations for the future; concepts of leadership and the role of decision making and communication processes (e.g. agile approach, selfguidance, self-organization)
- **Teambuilding / Teamdevelopment**
- **Professional Training in Conflict Management** for mediators, executive staff, internal counselors; implementation of conflict-management-systems
- **Management Development:**
 - Leadership under conditions of instability and uncertainty
 - Mindful leadership - presence and awareness as core competences for the future
 - Empowerment and control - essential polarities in leadership

Core competence

Anjas main focus is to identify appropriate and coherent solutions for the specific requirements of the client system. Along that way she places emphasis on:


- * empowerment of the whole system, using the knowledge of all involved for new tracks
- * developement of a clear and common understanding of responsibility and its realization.

Clients (shortlist)

Audi AG, Augustinus München, Bayerisches Staatsministerium für Arbeit und Soziales, Burda, Continentale AG, Deutsches Patent-und Markenamt, Erzbischöfliches Ordinariat, Fraunhofer Institut, ING-DiBa, kbo, Knott AG, Lapp Group, Loheland Stiftung, Mayflower GmbH, Swiss Re, Versicherungskammer Bayern, Universität Witten/Herdecke.

Publications (shortlist):

Köstler: „Mediation“, UTB/Ernst-Reinhardt-Verlag, München 2010
 Köstler/Bauer-Mehren: „Der Konflikt weiß alles besser“, Stuttgart 2012
 Köstler: „Das ist Mobbing!“, in: Die Wirtschaftsmediation 2/2013
 Köstler: „Next Level Leadership“, in: Trigon Themen 1/2016;
 Köstler: „Vom Personenkonflikt zur Zukunftsgestaltung der Organisation“, in: Trigon Themen 3/2017

	<p>Harald Jäckel was born in 1952. He studied business administration and worked as an entrepreneur in a medium sized company. With an additional sales qualification he became a sales representative in a well-known IT-company. After post graduate studies in the field of pedagogy and arts he was engaged in founding a Waldorf /Steiner school, in teaching and fulfilling leadership tasks for 7 years. Since 1992 he has been a consultant and trainer for organizational, management, personnel development, coaching and conflict management. He joined Trigon as a partner in 1994 and co-founded Trigon Munich in 2002. Harald is a member of the world-wide consultant network „Association for Social Development“. He is married, father of an adult daughter and son and lives in Prien by Chiemsee. His leisure activities include sailing, swimming, biking and philosophizing. Email: harald.jaeckel[at]trigon.de</p>
---	--

Fields of experience

Harald sees his core competence in stimulating change processes for persons and organizations and in supporting them during a result-oriented implementation of such processes. He accompanies concrete change processes with integrated qualification programs.

Fields of consulting

- Conceptualizing, supporting and implementing change management processes (diagnosis, future projection, decision-making and realization)
- Especially in large and complex change processes: building project structures, accompanying project teams, focusing on information and learning processes, conceptualizing and implementing large group interventions
- Creating market-oriented future projections (scenarios, visions, mission statements, strategies) along with the management and supporting the implementation
- Conceptualizing and running internal management development programs for employees in all hierarchy levels, optimizing and reorganizing management systems and processes, solving conflicts
- Dealing with resistance to ameliorate corporate and team cultures, clearing functions and roles, bargaining with involved parties
- Diagnosis, counselling and mediation in conflict situations
- Designing internal and external seminars with a focus on organizational-, personnel- and management development and conflict management

Experience in school development

Co-founding a Waldorf Kindergarten in Bingenheim in 1981, Waldorf teacher seminar at the Institute for Waldorf Education, Witten-Annen, co-founding of the Freie Waldorf School Wetterau in Bad Nauheim 1985, 7 years as teacher.

Consulting School institutions since 1992. 30 different school projects.

Development of school facilitators in 3 courses for 3 years each as a Trigon trainer - together with Michael Harslem. His new book 2019: The future shape of the Waldorf/Steiner school. A contribution to the innovation of structures and processes. Info3 Verlag. Frankfurt



A warm welcome

Organization development for Estonian schools

Training for school board trainers

Module 2

3. -7.2.2019

Kuressaare, Saaremaa

with

Anja Köstler

Harald Jäckel



Co-funded by the
Erasmus+ Programme
of the European Union



Please take place ...



on 5 tables each with 6 people in new mixed groups
(please fix for this modul)

- 1 Principal
- 1 School board leader from another school
- 4 Participants or Foreign participants
- 1 Young participant or Head of training division or University teacher
- minimum 1 participant of pre workshop

Extra table for Researchers

Extra table for trainers

Come in contact in the constant seating arrangement on tables in the 5 days

All in one room: individual, group, plenary work

Frequent exchange, more efficient working in table groups



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Rules/agreements of the game in our learning team (suggestion)

- Please speak and document english
- Perceive - instead of attribute something to somebody
Get to know contents
- Mistakes are part of learning! There are no "stupid" questions
- No justification
- Talk about yourself – not about „somebody“ – Please use „I“ statements
- Listen and let talk out – only the moderator is allowed to interrupt
- Please signal troubles
- JYU scientists – bring up a reflecting question
- Everyone has an active part of responsibility
- Our lived social culture sets an example
- Personal matters need protection in confidence
- If you leave or if you come later - please let us all know why
- Please be there 10min before start, so that we can start in time.
- Please organize roles in groupworks: Moderator, Timekeeper, Writer, Presenter



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Put on some „glasses“– and take responsibility in some special roles

Clearness

Time

Connection to reality

Balance 2x

Stop! Hidden message

Spontaneous feedback



Rise the card. Process will be stopped to clear now the rising question



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



My expectations



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



My expectations for this modul

What should be achieved?

Please describe as concretely as possible

- ✓ the events
- ✓ the results ...
- ✓ the conditions

which should have occurred and
which you want to have achieved



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The program



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Overview over the moduls

modul 1

Elementary social skills
Basic concepts
Education and school quality
Process of diagnosis
Contacing & contracting

modul 3

Process of learning
Process of information
Process of implementation
Process of psycho-social change
Process of change management
Budgeting & Controlling

modul 2

Contacting & contracting
Process of future design
Strategy, Presencing, Design thinking
Role of a consultant, Designing a workshop
Mindfulness
Structures and processes
Decision making

modul 4

Leadership
Collegial management

Conflict resolution
Dynamic of conflicts
9 stages of escalation
Interventions
Possibilities of Mediation
Exercises



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Module 2 / h	Monday	Tuesday	Wednesday	Thursday	Friday
9:00 – 10:30		Inner calmness The role of a consultant	Inner calmness Design thinking	Inner calmness Mentoring	Projects
Coffee	Coming 9:50 h Start 10:00 h				
11:00 – 12:30	Contacting & contracting Trends	Designing a workshop		Mindfulness	
Lunch					
14:00 – 15:30	Future Design Vision	Scharmer Presencing	Leadership	Leadership	Feedback End
Coffee					
16:00 – 18:00	Strategy			Decision-Making	
Dinner			Visiting schools		
19:00 – 21:30		Film			



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Saaremaa Municipality Government

Leader

Deputy leader

Head of Education

General / Education Advisor

Advisor of early childhood Education

Head of children and family support center

Head of Child Protection Services

Madis Kallas

Helle Kahm

Urmas Treiel

Oilme Salumäe / Meelis Kaubi

Maiu Raun

Aaro Nursi

Monika Sarapuu

	1	2	3	4	5
	<i>Kuressaare Gümnaasium</i>	<i>Saaremaa Uhisgümnaasium</i>	<i>Kärla PK</i>	<i>Pihla LA</i>	<i>Kaali PK</i>
Principal	Toomas Takkis	Viljar Aro	Sirje Ellermaa	Riina Saar	Kristiine Järsk
Head of School Board	Maris Rebel	Anton Teras	Ingrid Leemet	Eveli Nõgu	Taavi Tuisk



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The resonance group



- Participation of each person in at least one module
- Responsibility for participants' focus from the beginning of the actual module to the beginning of the next one

Tasks:

- Taking care of the organisational framework and procedure
- Forming an interface between participants and management
- Increase willingness to moderate group work
- Be awake for feedback from participants
- Collect open questions
- Even artistic exercises, short inputs, ...
- Management of the daily and weekly review
- Maintain the interface between the modules: intervision meeting
- Informal highlights: Evenings together, tobogganing, ...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Mega trends

1. Please take a look at the 25 Mega Trends ...
2. Have a little chat
3. Each person please choose 1-2 Trend cards
4. Please point out in the plenary session the special importance of this mega trend for your organization



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



My Focus

1 How am I affected by important changes:

2 What does this mean for my responsibilities:

7 My 3-5 big challenges:

6 What does this mean for employees:

3 What does this mean for the structure and my working approach:

4 What does it mean to me with regard to management culture, leadership style, leadership role, team building:

5 What other topics have major priority:



Co-funded by the Erasmus+ Programme of the European Union



Resonance group

Resonance groups

module 3 + JYU	module 4 + JYU
1) HILLAR	1) MOONA
2) RIHO	2)
3) MAI	3)
4) TILT	4)
5) TAAVET	5) MART
6) TAAVI	6) MARTIN
7) MOONA	7) ANTON

Resonance-groups

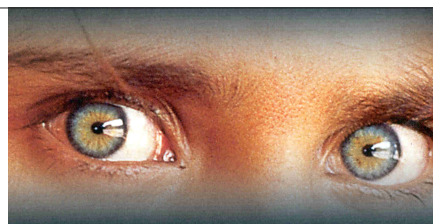
module 1 + Tiina	module 2 + JYU
1) OJERGEU	1) TONIS
2) ARVIDAS	2) ARTUR
3) PAUL	3) MERIL
4) TILT	4) AIVAR
5) BOŠTJAN	5) MADIS
6) VALERIE	6) TAAVET
7) HARLI	7)



Co-funded by the Erasmus+ Programme of the European Union



Intervisions groups



Short feedback:

- What did take place?
- Which topics / questions have occurred?
- Where do we go from here?



Co-funded by the Erasmus+ Programme of the European Union



© Trigon Entwicklungsberatung



Task for table groups

Repetition

1. Please recall the concepts from module 1
2. Please present essential aspects in plenary:
7 elements of an organization, 4 phases of development, 7 basic processes

Preparation 10 min

Please present in plenary session 5 min each



Co-funded by the
Erasmus+ Programme
of the European Union

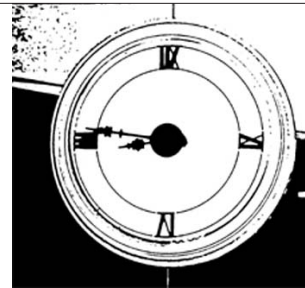


© Trigon Entwicklungsberatung



Quaker Quarter (15 min)

Take time to calm down inside.



Reflect on the really important aspects of the question.
Which questions are new to you? What else is unclear?
What new connections can you identify?

What is necessary for you...
so that you can take the decision responsibly?
to provide assistance?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



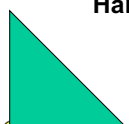
How satisfied are you with this day?



Very pleased ...



Less satisfied ...



Half and half satisfied...



Not satisfied...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Process Reflection

What has been successful from your personal point of view?
What does this mean for the near future?

What has been less successful?
What was missing?



Everyone can express himself/herself individually!
There are no justifications or comments



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Feedback Process Reflection

content

- Were the goals of the process clear to all?
- Have the questions been answered?
- Are the solutions appropriate, realistic?

interaction

- Was the social culture lived, the climate good?
- Have the parties achieved to get in touch?
- Could latent tensions be dealt with?

procedure

- Was the method appropriate?
- Were alternative methodological approaches weighed up?
- Have the resources been used in the best possible way?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Bagger Vance



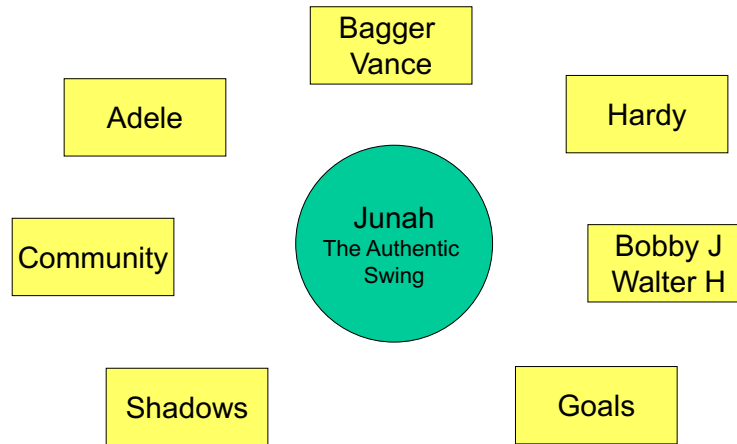
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The legend of "Bagger Vance"



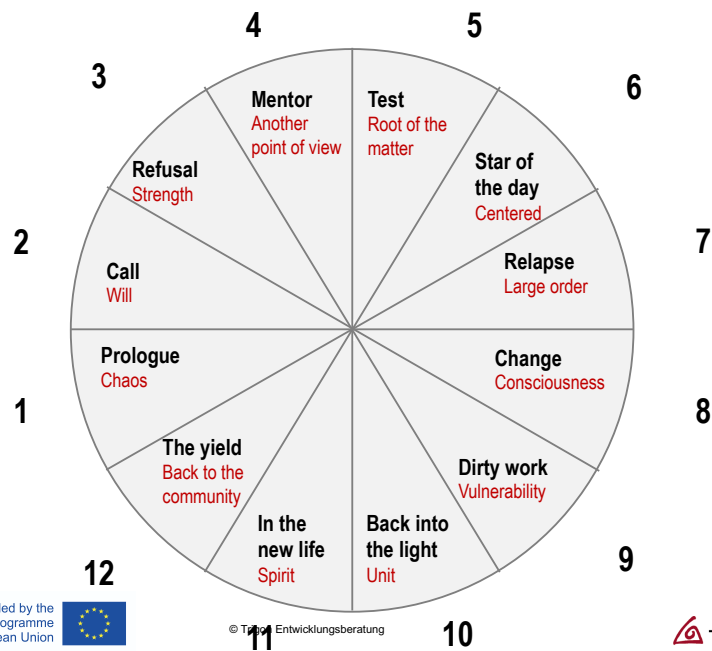
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The Journey of the Hero



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Thesaurus



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Soul (dictionary.com)

- the principle of life, feeling, thought, and action in humans, regarded as a distinct entity separate from the body, and commonly held to be separable in existence from the body;
- the spiritual part of humans as distinct from the physical part.
- the spiritual part of humans regarded in its moral aspect, or as believed to survive death and be subject to happiness or misery in a life to come: arguing the immortality of the soul.
- the emotional part of human nature; the seat of the feelings or sentiments.



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Spirit (Longman Dictionary of Contemporary English)

- the qualities that make someone live the way he/she does, and makes him/her different from other people



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Designing a whole process



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



	Steps in process	Project team	Local government	Principals	Board members	Teachers	Parents	Consultants	Invest days
	Participants								
	???	3	2	2	5	25	50	2	
1	Order, goals, design over all, budget, contract Build a Project team		1	2	5	20		2	2 x 0,5
2	Design specific, information policy	3		1	3			2	0,5
3	Kick off, official statements, expectations, time plan, questions and answers Large group workshop	3	2	2	5	25	50	2	1
4	Diagnosis of the situation - in NN workshops/interviews	1	2	2	5	25 ?5 ?15	25 ?5 ?20	1	6 x 0,5
5	Develop a future concept								
6	Look for the forces See which tensions to look after and conflicts to solve								
7	Build little fokus teams for part projects Clear how they will work Rules for communication								
8	Support part projects								
9	Information, response, dialog with the whole school system Large group workshop								
10									



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Entwicklungsberatung

Organization development for Estonian schools

Training for school board trainers

Future Processes

Visioning

2.00

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



7 basic processes of change

Processes of Diagnosis

Future Design Processes

Psycho-social Processes

Information Processes

Learning Processes

Implementation Processes

Leading and Managing the Change Process



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Instruments for shaping the future



Future design processes

- As far as possible, active participation of those concerned
- Observe the focus of the participants: Micro, Meso, Macro
- Work with the need of changing the past and the pulling force of future
- Apply macroscopic and microscopic view, as well as rational and intuitive methods
- Distinguish goals and paths



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Developing the future means:



- to be open to a paradigm shift
- to detach oneself from the stream of reactive consciousness
- to search for the really new and to grasp it in your mind
- to emotionally associate with it
- to get a vivid picture of the new situation
- to be able to describe this picture
- to recognize individual meaning,
i.e. for me or my own organisation



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



From "Vision to Action"

Without a vision of the future -

i.e. without a clear, internalized picture of a desired future - there is a danger that action will be exhausted in disoriented actionism.

Without appropriate action

a vision can easily take off and become an illusion or utopia.

Vision needs action.
Action needs vision.



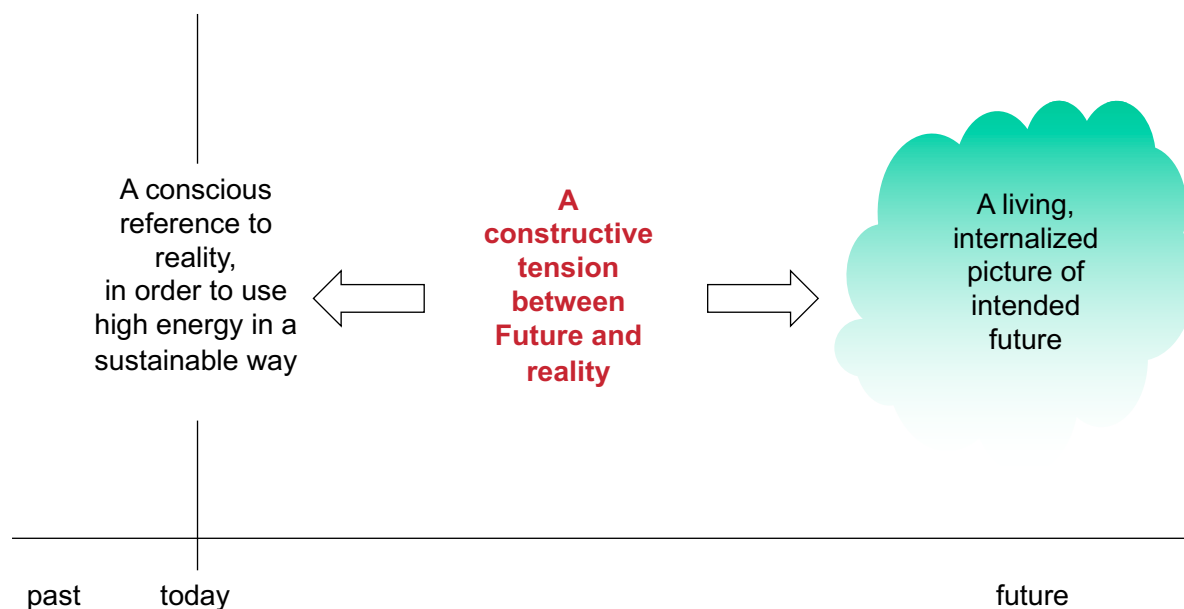
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Fruitful Tension



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Future trend

1. What vision of the future of unit in 3 years do I carry within me?
What could have been achieved? Where could be the unit then?
2. Which germinating beginnings of this future exist already today?
Where are they recognizable?
3. How could these seedy beginnings evolve to the next level?
What would have to happen?
4. If we really want to development this, what will we have to let go?
5. What would then be the practical next steps?
What should we start already from tomorrow?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Direction of change: With a change we want to get...

away from ...



and towards ...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Core questions to identify the DNA of an organization

What's the spirit of work in this organization?

What is the motivation to join this organization?

What is important on a deeper level?

What is the inner motivation for the people who work here?

What motivates them every day to work again?

What needs to be met here, so that people can feel good?

Which qualities help to come forward ... or to solve conflicts?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Brainwriting Method "6-3-5 – Form"

6 persons - 3 suggestions each - 5 minutes time each

- **Problem definition:**
- **Notes:** Identify yourself with the suggestion of your predecessor.
Further develop the suggestions of your predecessor
Please write clearly

	Proposal 1	Proposal 2	Proposal 3
1			
2			
3			
4			
5			
6			



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Creative path

1 Your question

2 How would you know,
that you have reached your future goal?

3 How can you make sure, that your goal is
guaranteed not to be achieved?

4 ... and what would be the positive reverse

5 How did others reach their goals?

6 Who else should hear about these ideas
and help to develop them further?



Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Visioning



Co-funded by the
Erasmus+ Programme
of the European Union



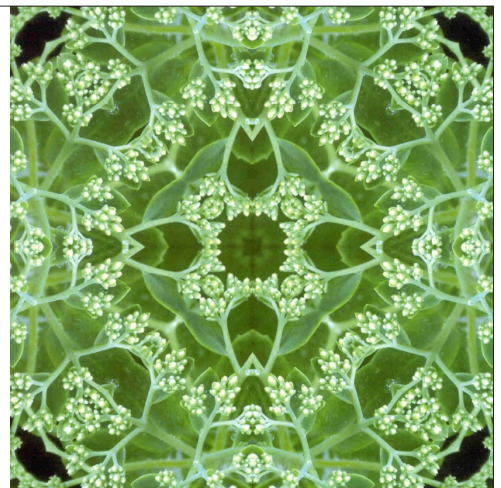
© Trigon Entwicklungsberatung



Vision quest is an old rite of passage

Objective:

- to live in the stream of time
- to be able to look over the threshold
- to learn to feel the new
- to find orientation
- to recharge one's batteries
- to learn to detach oneself from the old



Literature:

Forster, Steven; Little Meredith. Vision Quest.
Search for meaning and self-healing in the wilderness. Brunswick 1991.



Co-funded by the
Erasmus+ Programme
of the European Union



A common vision ...

- is an invisible spiritual force,
- that strongly connects people.
- Energies are aligned immediately.
- People are pulling in the same direction.



*"If you want to build a ship, don't round up the men,
to procure wood, provide tools and distribute work,
but teach them the longing for the endless sea."*

(Antoine de Saint Exupéry)



Co-funded by the
Erasmus+ Programme
of the European Union



A vision is:

- the dramatization of our ideals, values, goals, desires
- condensed to a picture
- imagined
- "unreasonable," because it arises in the realm of feelings and wills
- something very personal
- radical with regard to the resulting consequences
- obligatory



Co-funded by the
Erasmus+ Programme
of the European Union



The Small Vision (Realimagination)



- A for me clearly recognizable "apparent" development
- Next steps, results and consequences are obvious to me
- Emotional concern



Co-funded by the
Erasmus+ Programme
of the European Union



Difference between vision and illusion:

Illusion is:

- Arbitrary statement
- "Castle in the air", obvious impossibility
- Bypassing the important questions
- No emotionally binding reference to my person
- Seems ridiculous
- Undermines serious search for shaping the future



Co-funded by the
Erasmus+ Programme
of the European Union



Develop a vision exemplary for ...

- New forms of living and housing in old age
- A consulting institute with specific core competencies
- A new business idea, e.g. in e-commerce
- A possibility of cooperation of a virtual international team



Co-funded by the
Erasmus+ Programme
of the European Union



Friedrich Glasl Recommendations for visionaries

- Look at a time span from 3 to 5 years ahead
- Consider larger contexts, get away from details.
- Get on a helicopter and look at your organization from a distance (bird's eye view)
- Detach yourself from all "ifs and buts."
- Describe as lively as possible in vivid pictures
- Address as many senses as possible: describe what can be heard, grasped, smelled, tasted, seen, ...
- Use a simple language and name symbols
- Describe your sensations, address the emotional one
- Do not slip into regions of unreality
- Look also at your own role



Co-funded by the
Erasmus+ Programme
of the European Union



Steps of concrete vision work

1. My focused question to the future? Time horizon?
2. Prepare vision search
3. Dream vision
4. Work out, condense, supplement vision
5. Advocatus Diaboli
6. Breaking down to objectives, instruments
7. Communicating Vision
8. Realize your vision



Co-funded by the
Erasmus+ Programme
of the European Union



Preparation of my vision journey

- What exactly is my question?
What is the aim of this question?
Is the answer to this formulation what I am really asking?
- How is my feeling about that ...
How does the question sound in me?
How does it touch me?
- How high is my identification ...
What does this question mean to me?
What could an answer give to me?
- Developing my own vision for ??? years in advance
I carry the following pictures already today in me ...



Co-funded by the
Erasmus+ Programme
of the European Union



Communicating visions

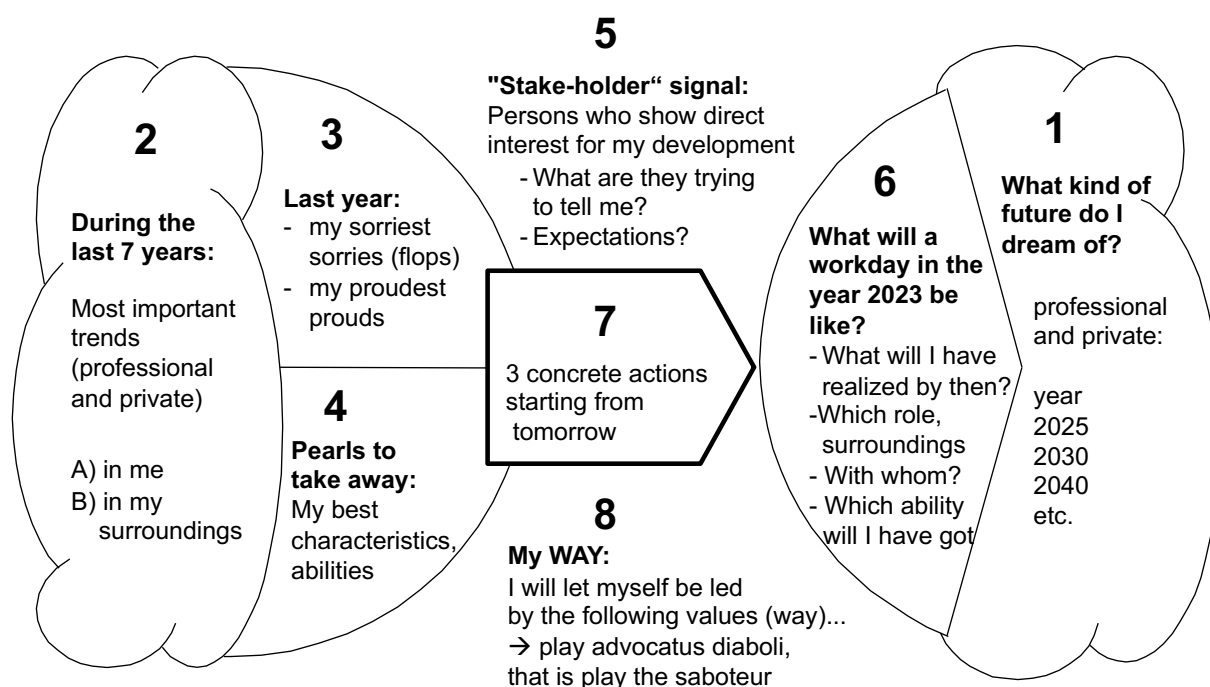
- as a speech to a jungle expedition before leaving home
- as a speech to a sailing crew on the ship in port before the start of the voyage
- as a speech to a rope team before leaving base camp
- as a speech to your own football team before the quarter finals in the away game
- as a speech to the Formula-1-pit-crew before the decisive race
- as a speech to a theater ensemble in front of the next premiere



Co-funded by the
Erasmus+ Programme
of the European Union



To Create My Own Vision



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Trends and developments

2.03

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Trends & Developments

Trends & developments

Importance for
your company
0 = insignificant
3 = very significant

Try to concretise the trends
that are important for your
company!



Megatrend

Digitalisation

- Platform economy
(booking.com, mobile.de,
amazon ...)
- Digital back office,
decision by algorithms
- Networking - Internet of
Everything
- Work on demand –
anywhere, anytime
- All processes are
digitally depicted



Megatrend

New energies / resources

- *Nuclear phase-out, coal-fired power plants*
- *Energy from wind, solar, hydropower, geothermal energy*
- *Northstream Gas Pipeline*
- *New power lines*
- *Small power plants for households*
- *Battery technology*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Climate change / environmental pollution

- *Extreme weather events*
- *Tropical storms*
- *Rising sea levels*
- *Melting of glaciers and polar caps*
- *Microplastics*
- *Antibiotics*
- *Dieselgate*



Co-funded by the
Erasmus+ Programme
of the European Union



megatrend

Changed consumer behavior

- *All information on the Internet*
- *Online trade growing*
- *Demands on perfect process chains (Amazonization)*
- *Joint consumer representation of interests (forums, blogs ...)*
- *Danger of the inner cities being orphaned*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Deep Learning / Artificial Intelligence

- *Computers can hear, understand, speak, write, recognise images, use collected knowledge in a targeted way, recognise patterns.*
- *Automated identification*
- *Language analysis with typologisation (application)*
- *Human question of existence*
- *transhumanism*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Industry 4.0

- *Assistance systems in production (robotics)*
- *Smart factory*
- *The deserted factory*
- *Other Jobs*
- *Customer interaction*
- *Networking of sensors, data and learning systems*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Agile working methods

- *Scrum*
- *Kanban*
- *Design thinking*
- *Two-handed guidance*
- *SAFe*
- *Sprint planning*
- *Retrospective*
- *Incremental learning*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Connectivity

Knowledge is available everywhere
car-to-car communication
Internet of everything
Virtual Worlds

Cambridge Analytics
High mobile phone penetration
addiction phenomena
Apple Watch, Google glasses
data goggles



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Mobility => "e"

- *Diesel bans*
- *Farewell to the internal combustion engine?*
- *Networked driving*
- *Battery costs*
- *12% Electric cars mandatory in China*
- *Self-propelled cars, trucks*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Disruptive change

- *Car trade or e-mobility?*
- *Banks or Fintechs?*
- *Taxi or Uber?*
- *Are there "safe" industries?*
- *Diesel or sharing of autonomous vehicles?*
- *Digital vulnerability*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Globalization / Open Market

- *Internationalisation of markets - new tariffs*
- *Emerging markets are players*
- *Cheap imports*
- *Growing number of super wealth and poverty*
- *Exponentially growing air traffic*
- *Long-distance tourism*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Urbanisation

- *Focus on cities as a way of life and culture*
- *The "green city"*
- *Citizens' initiative and participation*
- *Transition Town*
- *Move it: Innovation City*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Demographic change

- *Demographic gap*
- *New value of the > 65 year olds*
- *Postponement of the retirement age*
- *War for Talents*
- *Increasing life expectancy*
- *Overpopulation*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Self-organisation / flexibilisation Team development next level

- *Reduction of hierarchy levels*
- *Circle structures*
- *Focus on social skills*
- *Laloux: Reinventing*
- *Sociocracy*
- *Holocracy*
- *Spiral dynamics*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Customisation

- *Individualized careers*
- *Generation Y, Z*
- *New Independence*
- *Personalized networking and communication*
- *Many smaller expert capacities*
- *More single households*
- *Pluralized life forms*
- *Lifelong learning*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Co-working and Collaboration

- *New rules and forms of cooperation*
- *Open Innovation*
- *Spontaneous Teams*
- *Cross-organizational thinking and acting*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Leadership next level

Culture Change im Management

- *Leadership as a service function*
- *Self-regulation instead of hierarchy*
- *Reflection and feedback*
- *Self-organization needs leadership*
- *New cooperative forms of learning*
- *Self-controlled budgets*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Mindful leadership

- *Out of esotericism*
- *From stress reduction to basic competence*
- *Search inside yourself*
- *Twitter CEO meets Dalai Lama*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Work-life balance

- *Entitlement to reconcile work and family life*
- *More father timeout*
- *Management career also with part-time work*
- *Growing investment in quality leisure activities fitness, bikes, travelling*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Women in leadership

- *Quota system*
- *Equality:
Salary + Career*
- *Compatibility of family
and career*
- *More births again*
- *16.7 % Women in
management positions in
Dax groups*
- *Women ready to lead???*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Eco-philosophy

- *Climate change*
- *Conservation of resources*
- *Environmental protection*
- *Purification of the seas*
- *Extinction of species*
- *Bee deaths*
- *Social commitment*
- *Corporate Social
responsibility*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

New World Order

- *America first!*
- *Brexit*
- *EU in crisis*
- *Success of the populists*
- *China on the upswing*
- *Taliban / IS*
- *Warlike entanglements*
- *10 mio persons on the
run*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Financial world on the move

- *New currency and payment systems*
- *Bitcoin and others*
- *Blockchain Technology*
- *Impending financial crisis 2.0*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Refugees in Motion

- *Overstretching politics*
- *Further inflow*
- *Deal with Turkey*
- *Camp for refugees*
- *Failing feedback*
- *EU in Africa*
- *Much more men*
- *German "Leitkultur"*



Co-funded by the
Erasmus+ Programme
of the European Union



Megatrend

Changed health systems

- *Health card*
- *DRGs*
- *Financial distress of smaller units*
- *Growth of private health groups*
- *Pharmaceutical profit orientation*
- *Alternative Medicine*
- *Digitalisation*
- *Doctor via Skype*



Co-funded by the
Erasmus+ Programme
of the European Union



Organization development for Estonian schools

Training for school board trainers

Strategy development

2.04

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



Strategy in 30 words

- Please formulate the strategy of your organization spontaneously in 30 words or less
- Strategy is a way to achieve certain goals under competitive conditions



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Example Strategy in 30 words

We...

- strengthen the reliable relationships with our regular customers
- generate growth in a space of individual design and development
- design creative concepts for products/services market-oriented
- promote fun and powerful personalities



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Principles of the strategy



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Strategic thinking

is future-oriented thinking in terms of opportunities and risks

Strategy

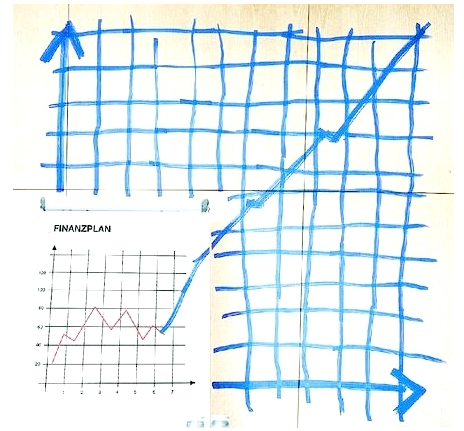
is the control of success factors

Strategy development

is a mutual adjustment, alignment, coordination, control of different activities of an organisation that affect profit or loss

Strategy implementation

is to create competitive advantages in a targeted manner and then maintain the distance to competitors



Co-funded by the
Erasmus+ Programme
of the European Union

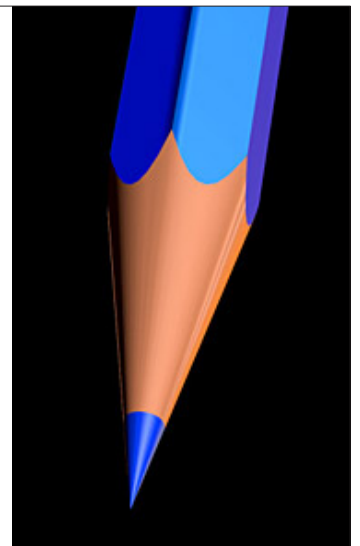


© Trigon Entwicklungsberatung



Strategic principles

- Concentration of forces on promising potentials
- Strengthening of strengths - **focus means renunciation!!**
- Consistent use of opportunities in the market field
- Creative innovation: Different from others
- Harness synergies
- Calculated risk
- Simple and clear
- Persistent and consistent



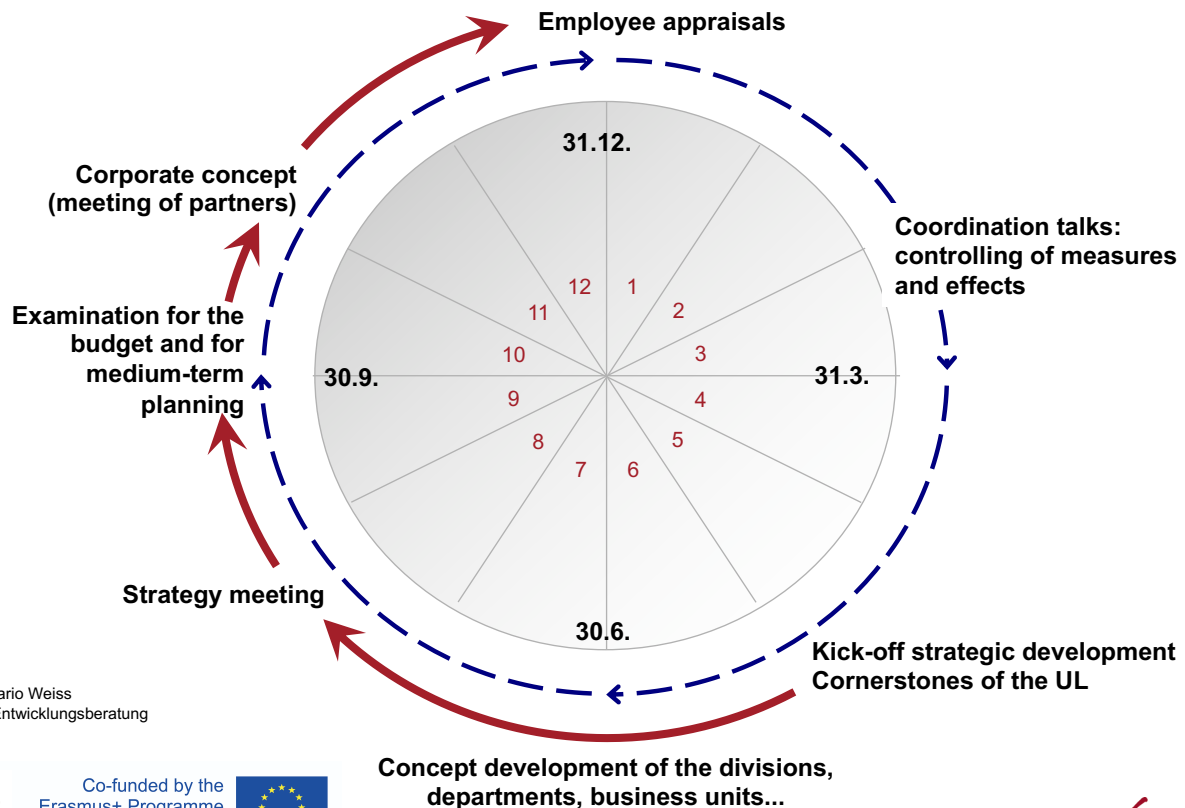
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Integrated annual planning



© Dr. Mario Weiss
Trigon Entwicklungsberatung



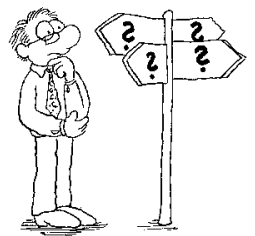
Co-funded by the
Erasmus+ Programme
of the European Union



Strategic business fields / service fields

Classification criteria

- Related product structure (from customer perspective)
- Homogeneous customer groups / needs
- External market presence
- Uniform market
- Business segment specific strategy possible
- Organizational delimitability
- Minimum/maximum size
- Heterogeneity between the business segments
- Clear allocation of revenues and costs



Example of a bank:

Private customers
Business customers
Key accounts

Payment transactions
Investment advice
Lendings/loans
Real Estate



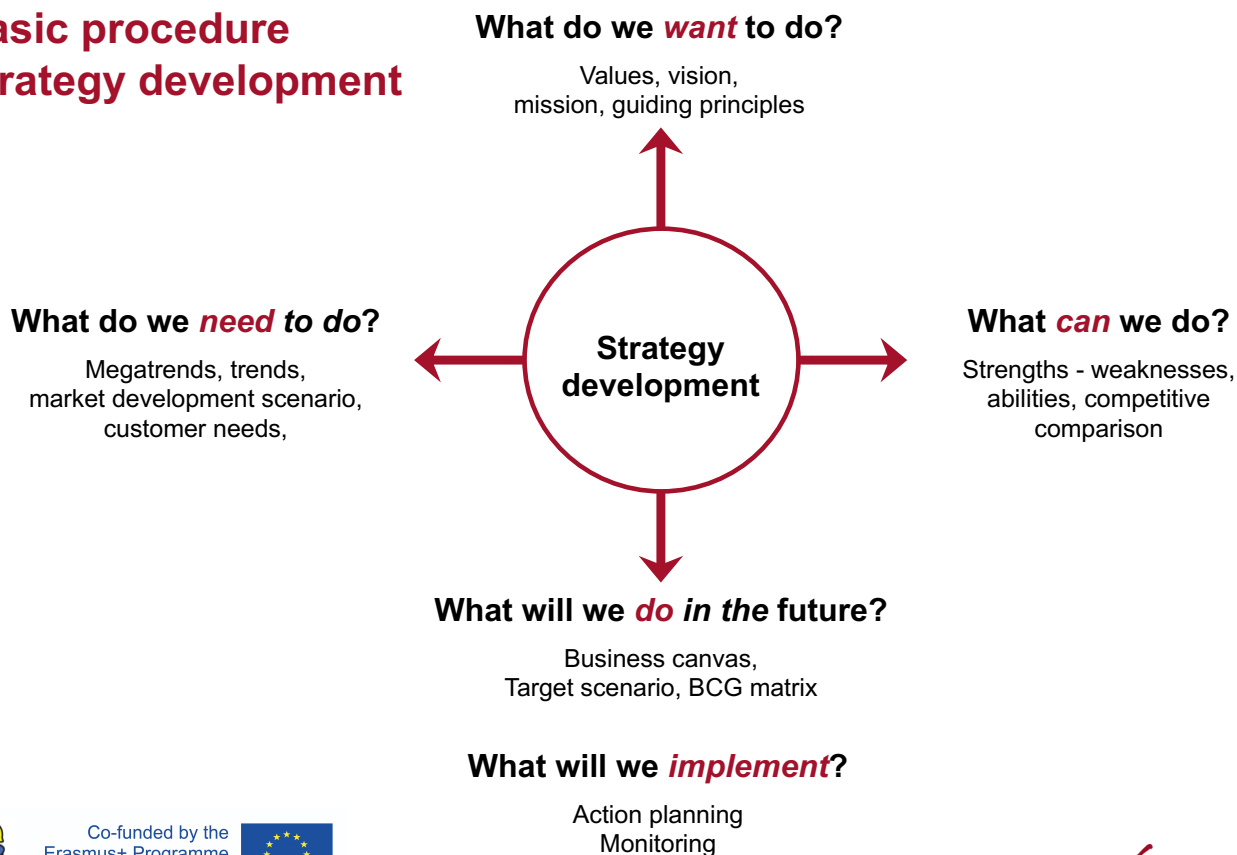
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Basic procedure Strategy development



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What do we need to do?

Trends and developments
in the environment according to fields of observation

Actual/real scenario
What will happen without us being able to influence it?

What do we want to do?

Vision, mission, mission statement
Future development
Flow of the future

Customer benefits
in the context of competition

Strategic portfolio
Product life cycle
BCG portfolio

Target Scenario

What can we do?

Strategic analysis
Competitor comparison

Strategic
Successful positions

SPOT analysis
with extension



What will we do in the future?

Overall strategy
formulated

Balanced scorecard



What do we implement?

Measures



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What do we need to do?

Trends and developments
in the environment according to fields of observation

Actual/real scenario

What will happen without us being able to influence it?

What do we want to do?

Vision, mission, mission statement
Future development
Flow of the future

Customer benefits

in the context of competition

Strategic portfolio
Product life cycle
BCG portfolio

Target Scenario

What can we do?

Strategic analysis
Competitor comparison

Strategic
Successful positions

SPOT analysis
with extension



What will we do in the future?

Overall strategy
formulated

balanced scorecard



What do we implement?

Measures



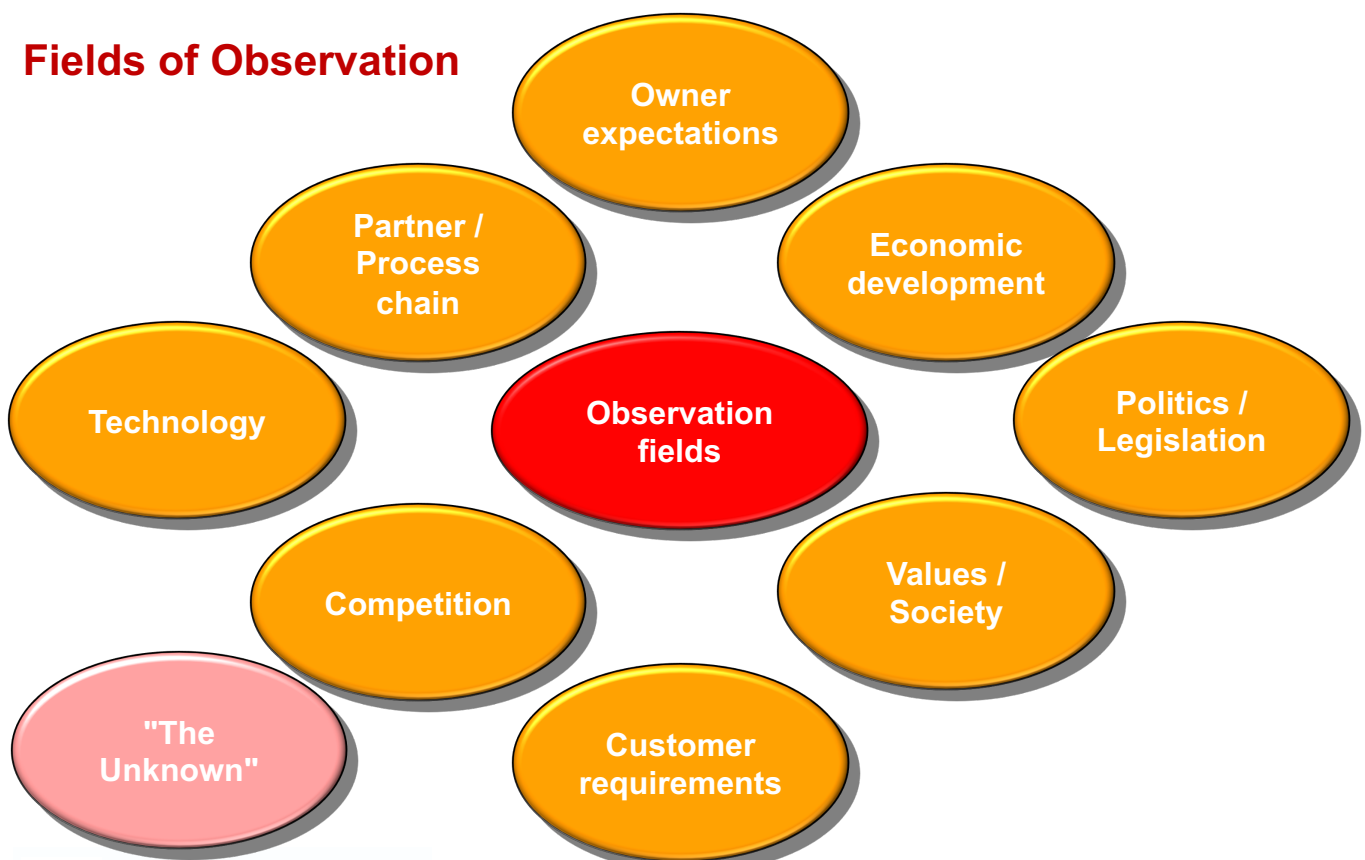
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Fields of Observation



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Important trends and developments in an observation field

Observation field	Relevant trends and developments	Importance for your organization 0=insignificant 3=very significant



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Real/actual scenarios:

What will definitely come to happen –
without a possibility for us to exert influence on this

	Work steps
1.	Define: strategic business field, type of service, product group, acting subject Time horizon: 3, 5, 10 years
2.	List and summarize relevant fields of observation
3.	Per field of observation: Review of trends 5 years, 10 years, 15 years: What has changed? (needs, problems, products ...) - quantitatively and qualitatively -
4.	Per field of observation: Future trends 2020 + 5 years = assumptions, interrelationships, complex developments
5.	Develop variants: optimistic - pessimistic Develop models
6.	Estimate probabilities of occurrence 0 - 100 quantitative/qualitative
7.	Testing Incidents, unforeseeable events, war, disasters, FAU
8.	Qualitative summary archetypical, metaphorical, journalistic



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What do we need to do?

Trends and developments
in the environment according to fields of observation

Actual/real scenario

What will happen without us being able to influence it?

What do we want to do?

Vision, mission, mission statement
Future development
Flow of the future

Customer benefits

in the context of competition

Strategic portfolio
Product life cycle
BCG portfolio

Target Scenario

What can we do?

Strategic analysis
Comparison with competitors

Strategic
Successful positions

SPOT analysis
with extension



What will we do in the future?

Overall strategy
formulate

balanced scorecard



What do we implement?

Measures



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Strategic analysis: comparison with competitors

Competitors: X, Y, Z, ...

- 1= decisive advantage
- 2= big advantage
- 3= slight advantage
- 4= slight disadvantage
- 5= big disadvantage
- 6= decisive disadvantage

Key market strengths and weaknesses	We	X	Y	Z	...	



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Customer benefits in the competitive environment

for most important products/services

	Today	Future	Competition 1	Competitor 2	Competition 3
Zero benefit					
Assumed basic benefit					
Expected Benefits					
Desired benefit					
Unexpected benefit					



Co-funded by the
Erasmus+ Programme
of the European Union

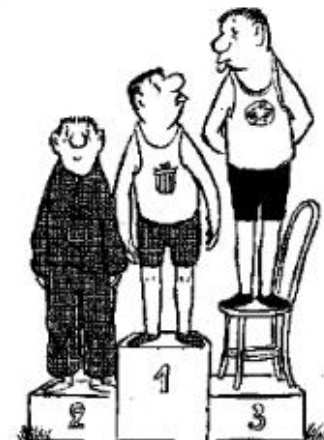
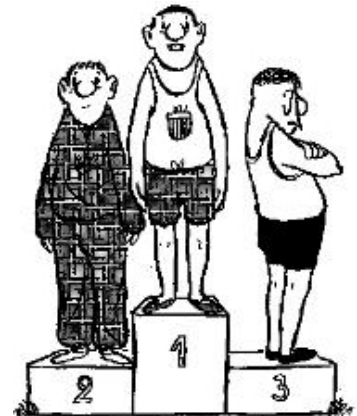


© Trigon Entwicklungsberatung



Strategic positioning in the field

- Achieving true superiority
Building a unique market position
- Developing a service profile,
which is not common among competitors
Establish a system of unique, hardly imitable business
activities
- Either offer customers a higher benefit/value
or a similar benefit/value at a lower price
or both
- More than just a marketing message!!



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Strategic success positions (competence pyramid)

- **Unique selling proposition competence determines unique selling possibilities**
Ability to offer in such a way that in the eyes of the target group an offer becomes unique and preferable through exclusive characteristics
- **Differentiation competence determines differentiating features**
Ability to offer in such a way that the target group perceives the provider cluster with similar, but distinguishable characteristics of an offer
- **Basic competence determines basic characteristics**
Ability to offer in such a way that the target group takes note of an offer (service, offering organisation) as an alternative to the competitive offer on the market



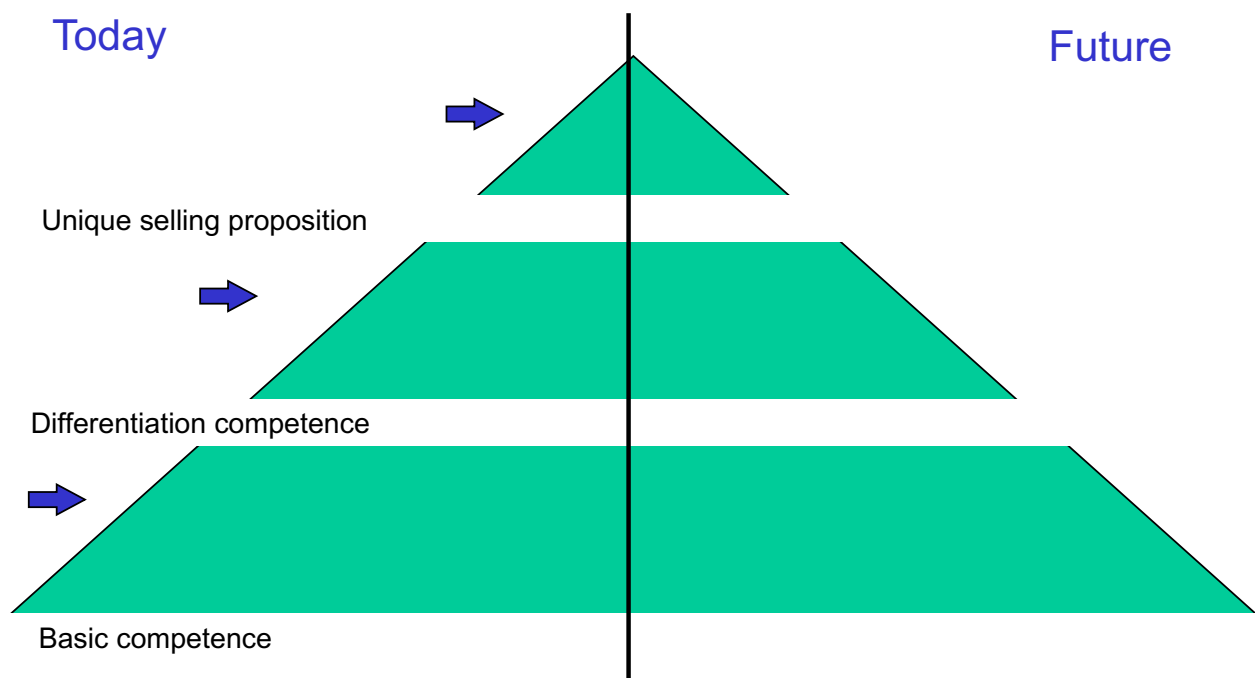
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Strategic success positions (competence pyramid)



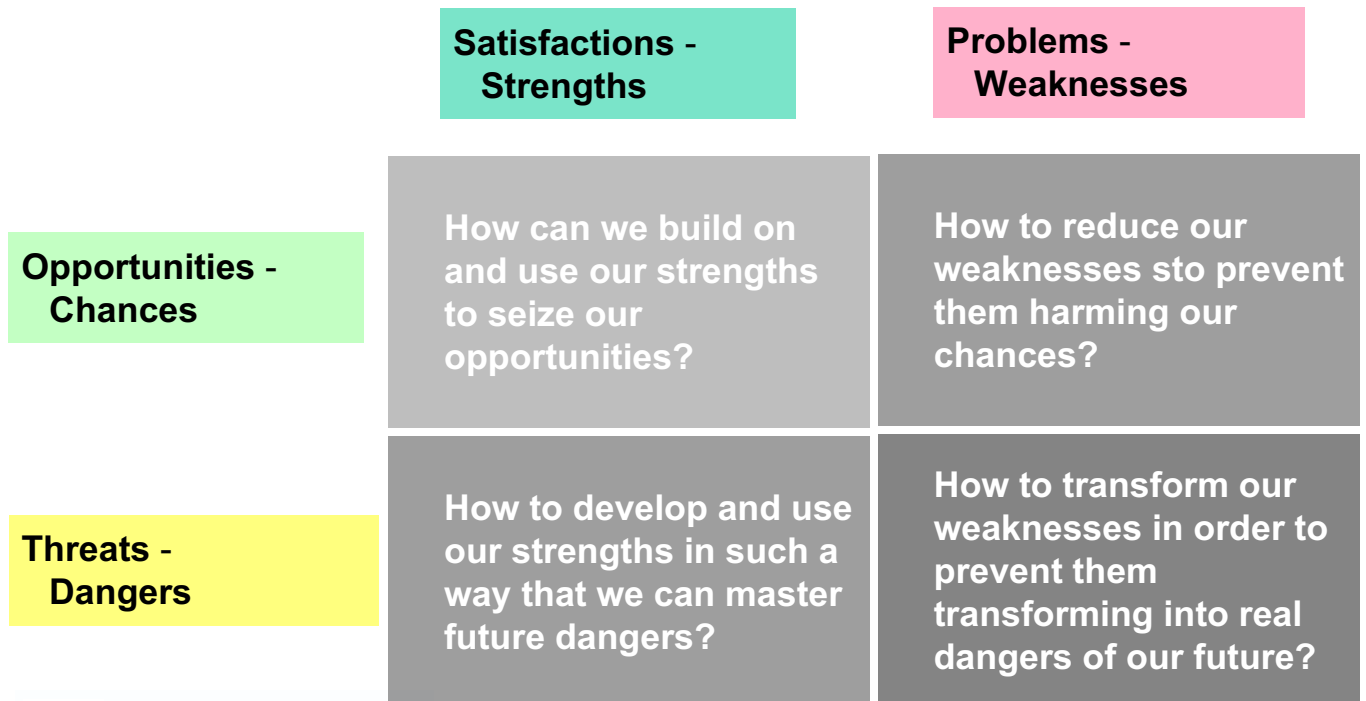
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



SPOT - Analysis extended in 8 dimensions



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What do we need to do?

- Trends and developments**
in the environment according to fields of observation
- Actual/real scenario**
What will happen without us being able to influence it?

What do we want to do?

- Vision, mission, mission statement**
Future development
Flow of the future
- Customer benefits**
in the context of competition
- Strategic portfolio**
Product life cycle
BCG portfolio
- Target Scenario**

What can we do?

- Strategic analysis**
Competitor comparison
- Strategic**
Successful positions
- SPOT analysis**
with extension



What will we do in the future?

- Overall strategy**
formulate
- balanced scorecard**



What do we implement?

- Measures**



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



A vivid picture of the future in X years ... What will be like then???



- How will the unity, the structure, the process, the open question... have developed further?
- Where will we be then? What hurdles, thresholds will we have overcome?
- What will have been achieved? What topics will we have mastered?
- What basic attitudes, attitudes will we have adopted?
- What abilities will we have gained then?
- What tasks will we then complete?
- What responsibility will we bear?
- What products and services will we offer? With which special features?
- Which customer segments will we serve?
- Which needs of our customers will we meet?
- How do we stand in relation to our competitors?
- How do we present ourselves to the outside world?



Co-funded by the
Erasmus+ Programme
of the European Union

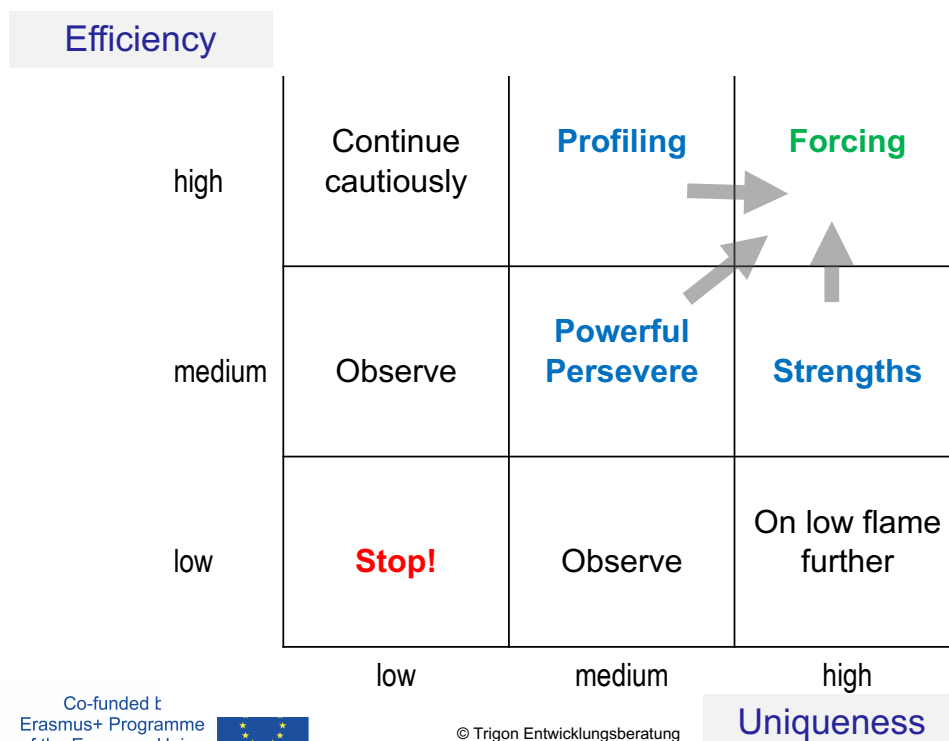


© Trigon Entwicklungsberatung



Strategic portfolio

With which 6 - 8 measures can you most effectively achieve your corporate purpose?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung

Uniqueness



Market attractiveness Competitive advantage

- Market growth
 - Market volume/purchasing power
 - Profitability of the market
 - Price sensitivity/room for manoeuvre
 - Intensity of competition
 - Substitutability of services
 - Access to procurement markets
 - Dependence on the economy
 - Reliance on laws
 - Dependence on the public
- Market share
 - Market access
 - Proportionate income
 - Know-how, experience
 - Number of know-how carriers
 - Cost advantages
 - Distinctness
 - Reference projects
 - Synergy potential
 - Long-term commitments



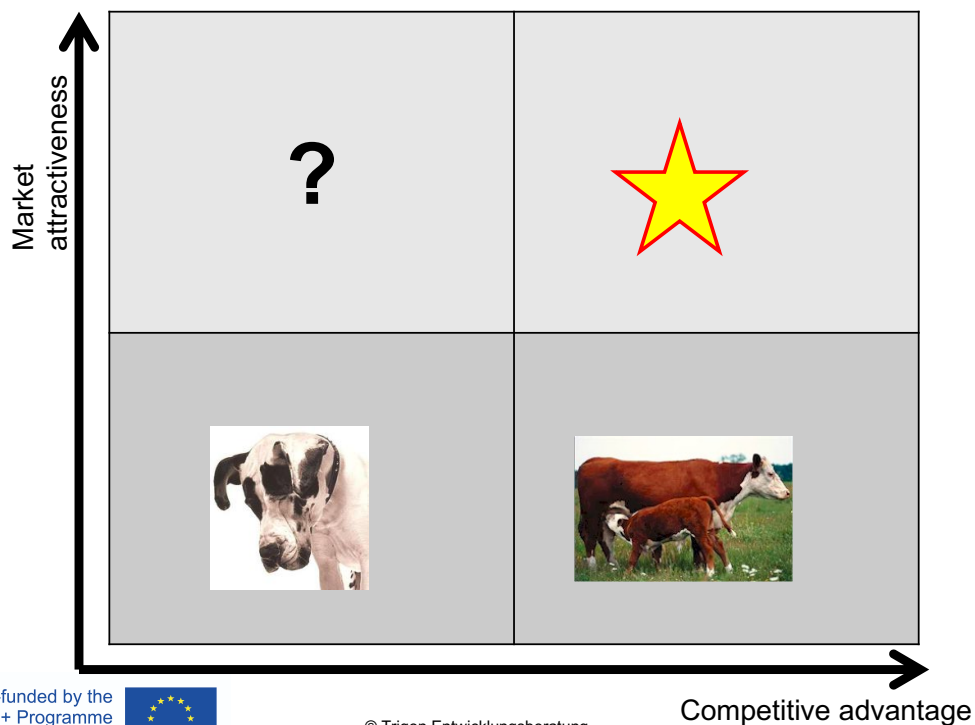
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



BCG portfolio



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung

Competitive advantage



Desire/target scenarios

What will happen if we are able to shape market events in our own interest?

	Work steps
1.	<p>Key intrinsic trends</p> <p>Past (5 years) What are the main changes in retrospect?</p> <p>Future (in 7 years) What will be the main changes?</p>
2.	<p>Which trends do we want to influence: divert - brake - accelerate - amplify - stop?</p>
3.	<p>Fictitious result report Futurum 2:</p> <p>Imagine that in 7 years you write a report about the actual improvements/developments that you are now striving for:</p> <p>(a) What are the minimum results that should then be achieved?</p> <p>b) What "more" would be desirable?</p> <p>Describe all of this as if you could actually state, see, and concretely describe these results now!</p>
4.	<p>What does that mean for the immediate future...</p>



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What do we need to do?

<p>Trends and developments in the environment according to fields of observation</p>
<p>actual/real scenario What will happen without us being able to influence it?</p>

What do we want to do?

<p>Vision, mission, mission statement Future development Flow of the future</p>
<p>Customer benefits in the context of competition</p>
<p>Strategic portfolio Product life cycle BCG portfolio</p>
<p>Target Scenario</p>

What can we do?

<p>Strategic analysis Competitor comparison</p>
<p>Strategic Successful positions</p>
<p>SPOT analysis with extension</p>



What will we do in the future ?



Overall strategy
formulated

balanced scorecard

What do we implement?

Measures



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



A formulated strategy using the example of ALLIANZ

Five goals of our strategy

1. profitable and sustainable growth

We are striving for profitable and sustainable growth in our three business segments of property and casualty insurance, life and health insurance and asset management.

2. balanced business portfolio with synergies

Our business segments and operating units complement and enrich each other, especially by serving the complex needs of our customers. We leverage Group synergies resulting from our strong brand, capital allocation, functional and underwriting best practices, joint run-offs and technology investments.

3. solid capitalization

We seek to preserve capital for our investors and are always careful to ensure that our business is built on a strong capital base to withstand shocks in the capital markets and protect the wealth of our clients.

4. world-class wealth management business

A serious and sustainable investment strategy that generates stable returns and, if necessary, compensates for low interest rates or the threat of inflation, is the basis for qualitatively strong growth and a solid capital base.

5. forward-looking risk framework

Through our risk management approaches, guidelines and systems, we set the framework for our investment-specific, underwriting and operational decisions within a prudently defined tolerance for predictable risks.

Through our risk management approaches, guidelines and systems, we set the framework for our investment-specific, underwriting and operational decisions within a prudently defined tolerance for predictable risks.



Co-funded by the
Erasmus+ Programme
of the European Union

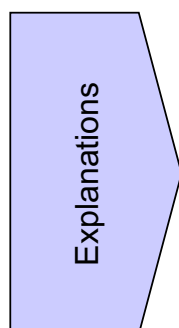


© Trigon Entwicklungsberatung



Our basic strategy

1. Quantitative sales growth and qualitative improvement
2. Strengthen and rejuvenate the brand profile through strategic, focused product range development
3. Unify and simplify internal processes
4. Developing new products
5. Opening up new distribution channels
6. Dynamization of the sales structure
7. Becoming more agile and flexible with a focus on market and customer orientation



- d
- e
- f



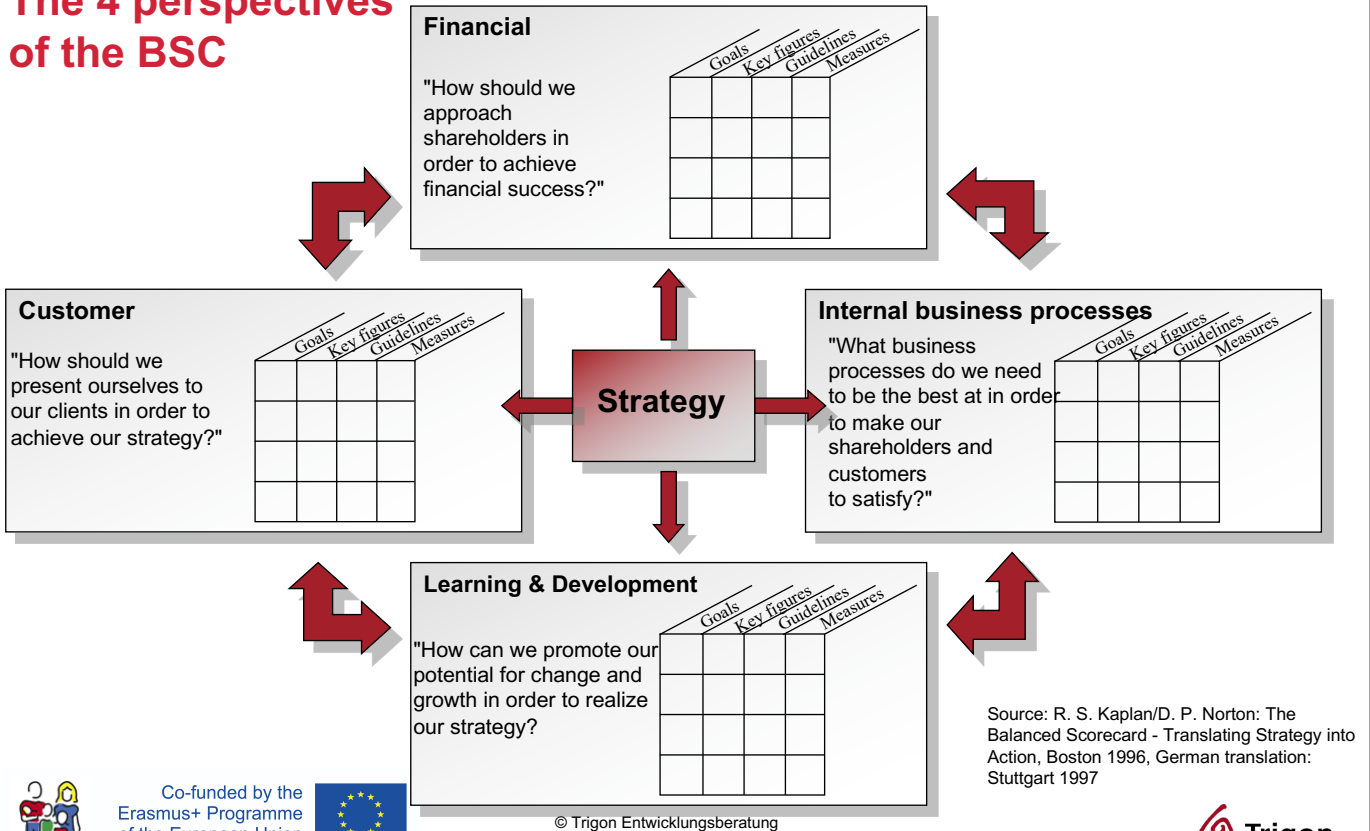
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The 4 perspectives of the BSC



What do we need to do?

Trends and developments
in the environment according to fields of observation

Actual/real scenario
What will happen without us being able to influence it?

What do we want to do?

Vision, mission, mission statement
Future development
Flow of the future

Customer benefits
in the context of competition

Strategic portfolio
Product life cycle
BCG portfolio

Target Scenario

What can we do?

Strategic analysis
Competitor comparison

Strategic
Successful positions

SPOT analysis
with extension

What will we do in the future?

Overall strategy
formulated

balanced scorecard

What do we implement?

Actions



Action

What?	
Target?	
Responsible?	
With whom?	
Until when?	
Conditions	
Importance: 0 - 10	
Urgency: 0 - 10	



✓ = Assuming clear
Co-funded by the
Erasmus+ Programme
of the European Union

To be discussed



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Canvas

2.05

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



Business Model Canvas

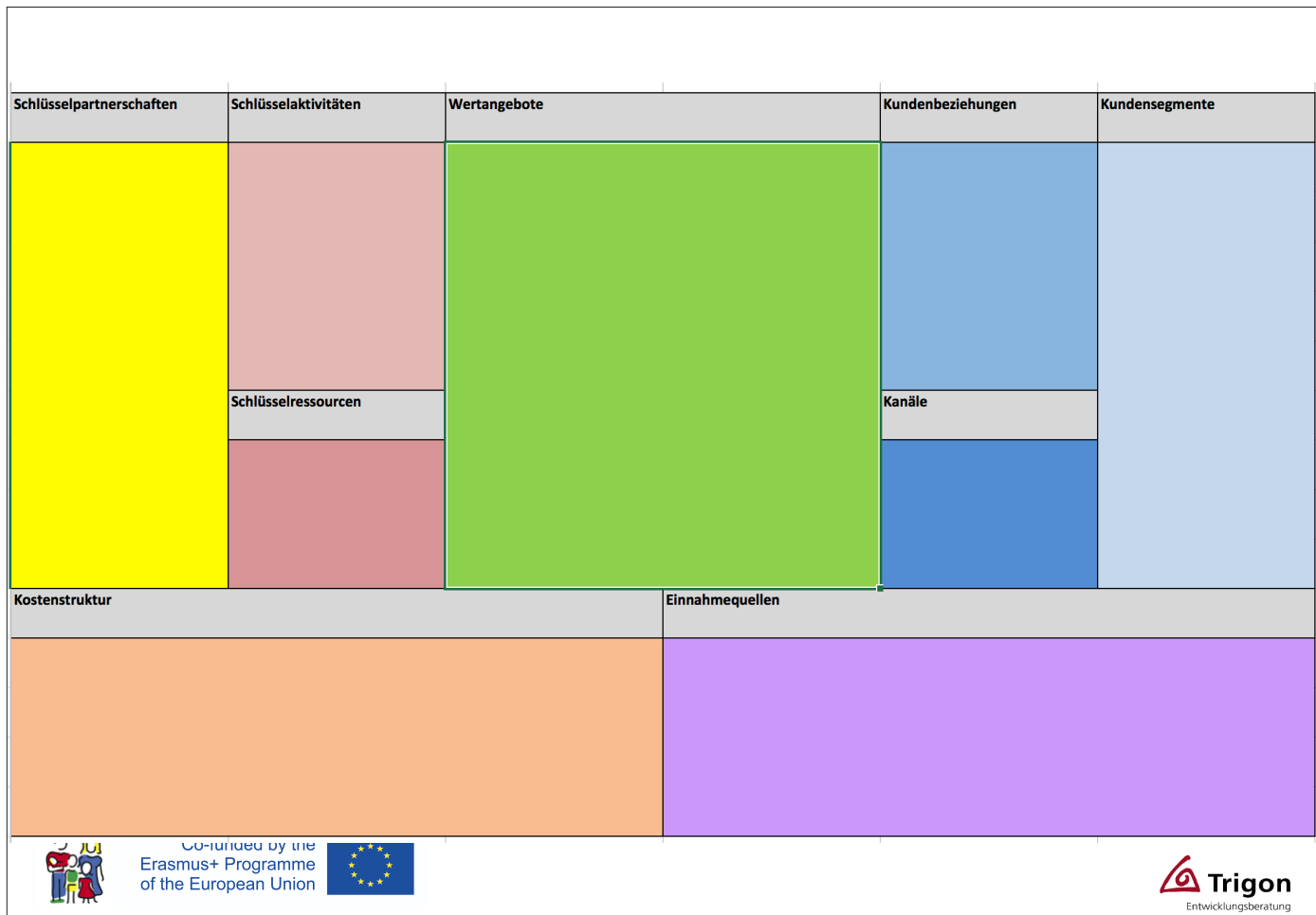
- The idea is to work together on an expression the size of a canvas
- Development of new products and services
- Generation of new business models
- Creation of a common language for all participating decision-makers
- More transparent processes in the team
- Joint business-relevant analyses
- Promoting sustainable strategic decisions in the team

Download a template: <https://strategyzer.com/canvas/business-model-canvas>



Co-funded by the
Erasmus+ Programme
of the European Union





BMI • Business model canvas

<p>● Key partners Who are your most important partners?</p> <p>Which key resources do you acquire from partners?</p> <p>Which key activities do your partners perform?</p>	<p>● Key activities What are the activities you perform every day to create & deliver your value proposition?</p>	<p>● Value propositions What is the value you delivery to your customer?</p> <p>Which of your customer's problems are you helping to solve?</p> <p>What is the customer need that your value proposition addresses?</p> <p>What is your promise to your customers?</p> <p>What are the products and services you create for your customers?</p>	<p>● Customer relationship What relationship does each customer segment expect you to establish and maintain?</p>	<p>● Customer segments For whom are you creating value?</p> <p>What are the customer segments that either pay, receive or decide on your value proposition?</p>
<p>● Key resources What are the resources you need to create & deliver your value proposition?</p>		<p>● Channels How does your value proposition reach your customer?</p> <p>Where can your customer buy or use your products or services?</p>		
<p>● Cost structure What are the important costs you make to create & delivery your value proposition?</p>			<p>● Revenue streams How do customers reward you for the value you provide to them?</p> <p>What are the different revenue models?</p>	

Business Model Canvas for ...

key partner Who are our key partners?	key activities What do we have to do to win customers and to deliver our services?	value propositions What do we offer? What are the benefits for the customer?	customer relations What maintenance of the relationship is necessary?	1 Customer segments Which customer group do we address?
key resources What is/are key resources for this business? How available is this resource?				canals How do we reach our customers? How do they get to us?
cost structure What are the most important costs in our business model? Which activities and resources are most expensive?			revenue streams What do we earn? What does the customer pay for?	



Co-funded by the
Erasmus+ Programme
of the European Union



Business Model Canvas for Spotify

key partner record label deployment platforms mobile operators automaker payment provider social Networks terminal manufacturers famous artists last.fm wikipedia developer media & festivals gift cards distributor non-profit organizations advertising partner advertising for Free server maintenance	key activities purchase of new music licenses upgrade server software development conduct contract negotiations with licence holders build partnerships	value propositions users: extensive music library legal music listening free of charge / inexpensive selection of playlists sharing through social media easier search, similarity search music immediately available playable on different mobile devices advertisers: targeted advertising various advertising formats: sponsored session video takeover, audio, display, billboard, homepage takeover, branded playlist advertiser page user information increase of awareness	customer relations free account premium account student rate spotify family forum contact form email guidelines for advertisers blog	1 Customer segments unknown artists music lovers advertising companies
key resources hardware Software licenses staff				canals website spotify.com apps pre-installation on end devices free to download
cost structure royalties / personnel costs maintenance costs (hardware ...) development costs /advertising			revenue streams vouchers advertising revenues subscriptions	



Co-funded by the
Erasmus+ Programme
of the European Union



Numbers Spotify in 2017

- 71 million paying subscribers
- 88 million free users
- Annual turnover 4 billion euros
- Loss of 1.2 billion euros
- Financing costs 974 million Euro
- Expectation 2018: sales 6 billion euros, 90% subscriptions, 10% advertising



Co-funded by the
Erasmus+ Programme
of the European Union



Strategic Change Canvas for a concrete change project

Conception: What is our vision for this change?		Importance: Why is change important for us?			
Success factors: When are we successful?		Measuring progress: How and where do we show progress?			
Who and what is affected?: Which people, organizational units and processes need to change and how?					
How will we support our employees?: With which activities will we (leadership/change team) support/integrate the affected executives/employees in this change?					
What is our Activities Plan?	Launch: What do we start with?	Next steps: most important, activities?	Prepare: in planning	Running: currently in progress	Review: discoveries

See: <https://leanchange.org/strategic-change-canvas>



Co-funded by the
Erasmus+ Programme
of the European Union



Organization development for Estonian schools

Training for school board trainers

Presenting

2.06

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



"Yes, but we are interested in the truth," I said.
The old man made a mocking grimace.
"You can't find the truth, my boy. It'll find one."

Carlos Ruiz Zafón. Marina. Fischer Publishing House.



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Necessary spiritual conversion in me

- from judgmental thinking to exploratory thinking (Open Mind)
- from emotional reaction to feeling (Open Heart)
- from ego-centered will to intuitive experience in will (Open Self)

So away from...

- Downloading mental models



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The gesture to develop future

1. Focus
2. Immerse yourself in the diagnostic work
3. Interrupt, change context
4. Allow opening, paying attention
5. Turn attention to what is emerging
6. Trust and follow the emerging thought
7. Plastify the new



Co-funded by the
Erasmus+ Programme
of the European Union

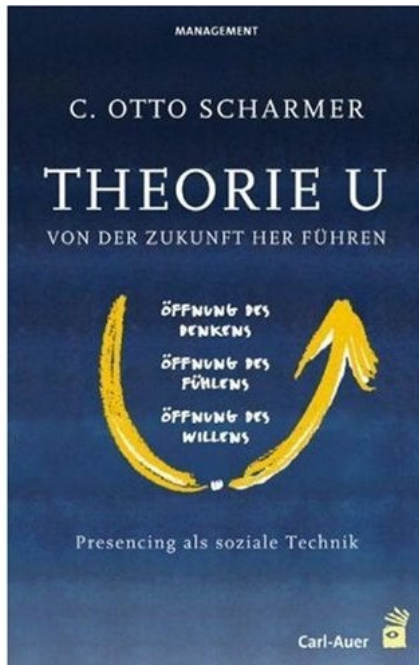


© Trigon Entwicklungsberatung



C. Otto Scharmer. Theory U.

Lead from the future. Presencing as a social technology



www.presencing.com

www.ottoscharmer.com

www.theoryU.com

www.dialogonleadership.org

www.presence.net



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



U Theory - Presencing by Claus Otto Scharmer at MIT, Boston

- Research on ability to perceive the energy field of future potentials
- Presencing is the ability in the present (presence), to feel a more comprehensive reality (sensing),
- to recognize and consciously penetrate,
- in order to be able to intervene in a formative way in the future that awaits us



Co-funded by the
Erasmus+ Programme
of the European Union

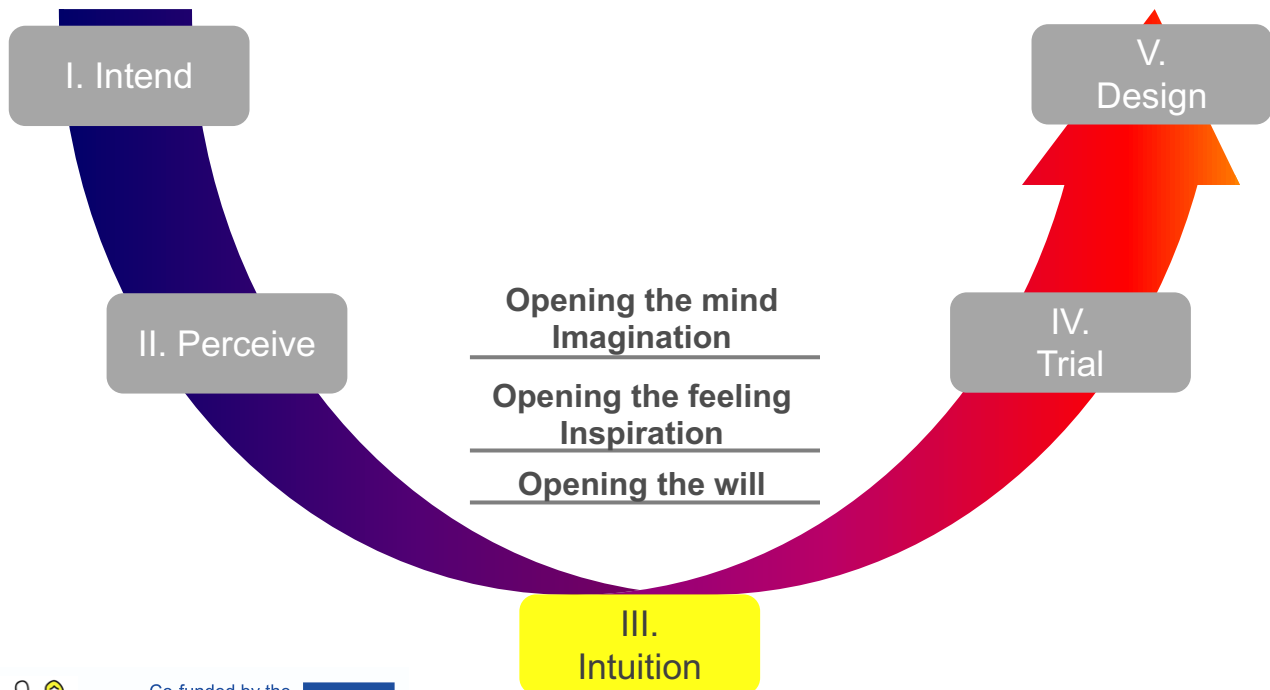


© Trigon Entwicklungsberatung



Theory U - Leading from the future

C. O. Scharmer. Heidelberg. 2009.



Co-funded by the
Erasmus+ Programme
of the European Union

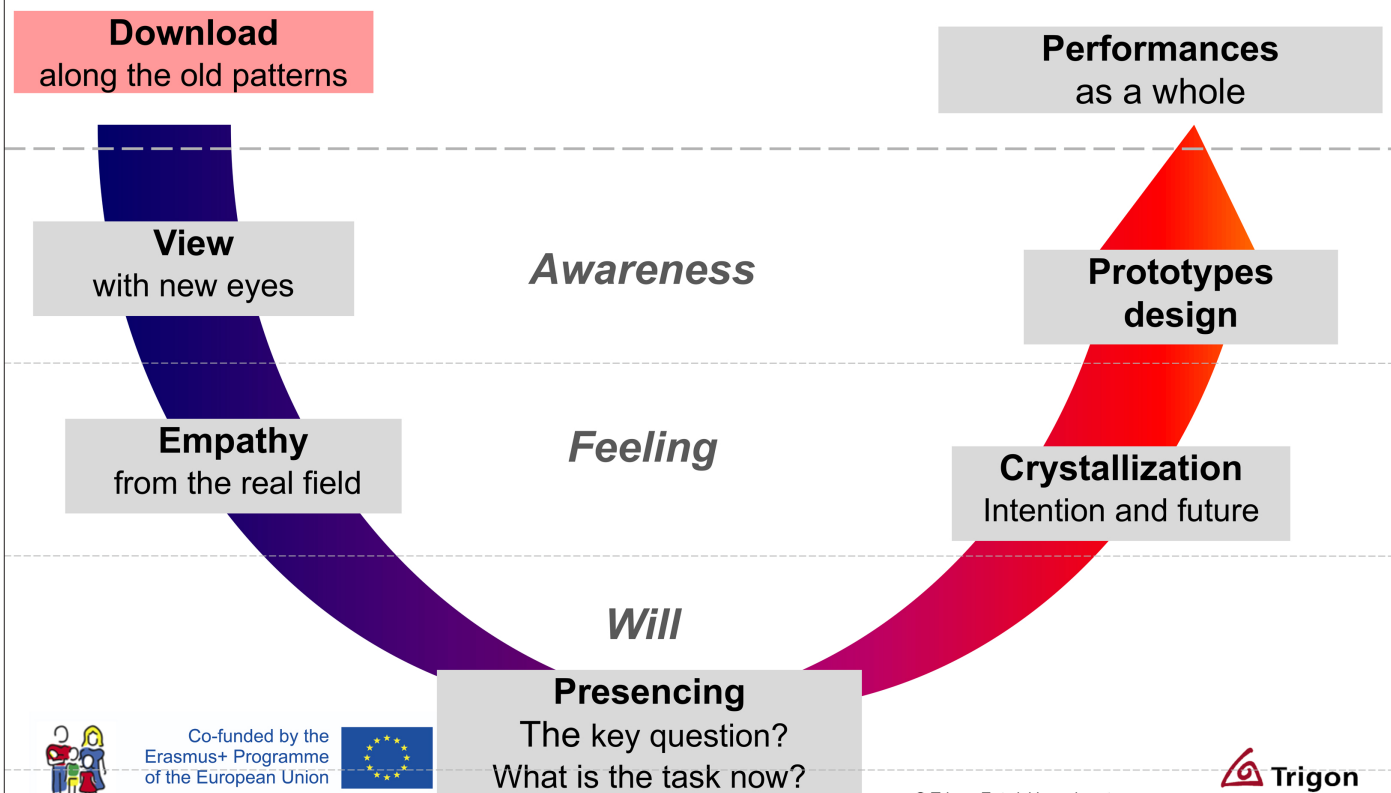


© Trigon Entwicklungsberatung

Trigon
Entwicklungsberatung

Theory U - Leading from the future

C. O. Scharmer. Heidelberg. 2009.



Co-funded by the
Erasmus+ Programme
of the European Union

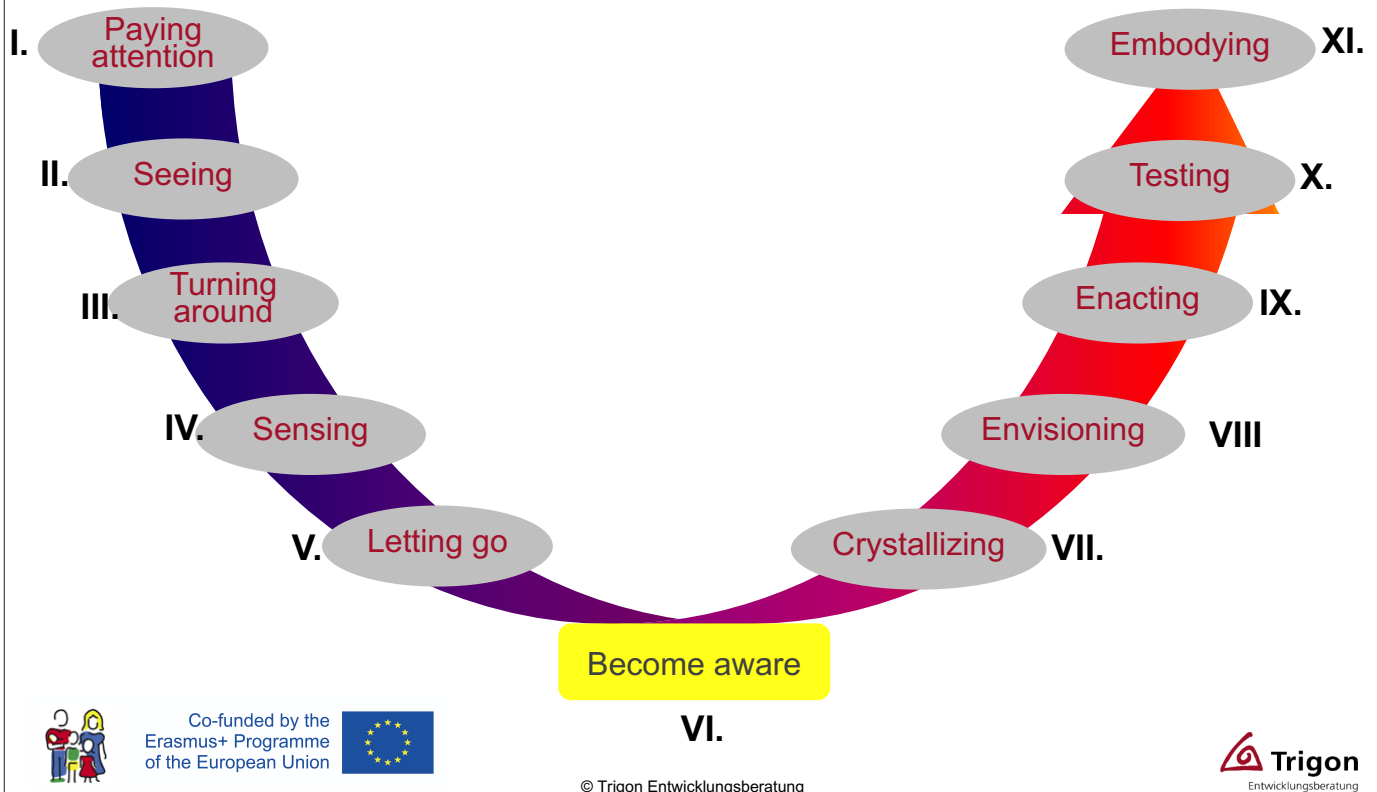


Presencing
The key question?
What is the task now?

© Trigon Entwicklungsberatung

Trigon
Entwicklungsberatung

Qualitative methodical steps in the U process



Intuition

- The best ideas come unexpectedly ... showering, hiking, reading...
In a relaxed state when I am all ME
- The flash of inspiration occurs when I am "in" a topic,
i.e. more deeply emotionally connected
- The "saving idea" often seems poetic at first, sometimes simple-minded,
amateurish
- In a "flash of inspiration" the wholeness becomes visible

Paul Hindemith:

"Who is unable to create a composition in the light of a single moment
in its absolute wholeness, but at the same time in every single detail
...will never become a real composer."

(H. Barth. All-powerful music. 1984. p.129)

Intuition

Paul Hindemith:

"Who is unable to create a composition in the light of a single moment in its absolute wholeness, but at the same time in every single detail ...will never become a real composer."

(H. Barth. All-powerful music. 1984. p.129)

Friedrich Schiller:

In the beginning of every great work of art there is "a dark powerful total idea", a vague emotional grasp of the whole work.

Quoted after S. Langer, Feeling and Form.

Gauss, the mathematician, wrote about a theorem which he had tried to prove for years without success: "I finally succeeded two days ago, not thanks to my laborious efforts, but by the grace of God. Like a sudden lightning bolt, the mystery was solved. I myself cannot say what was the red thread that connected what I knew before with what made my success possible.

Quoted after: Gauss. A letter. Revués Questions Scientifique. October 1886.



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Presencing - for a personal question

as a process in the here and now



Co-funded by the
Erasmus+ Programme
of the European Union



1

Paying attention

a) Developing a question (5 min)

It is important to formulate a **real question**,
one that has something to do with me as a person, that moves me inside

b) Diagnostic instrument (15 min)

Four perspectives of life - Ken Wilber

What answers to your question can you think today
from the perspective of the four quadrants

The aim is to concretise and/or extend it through new aspects



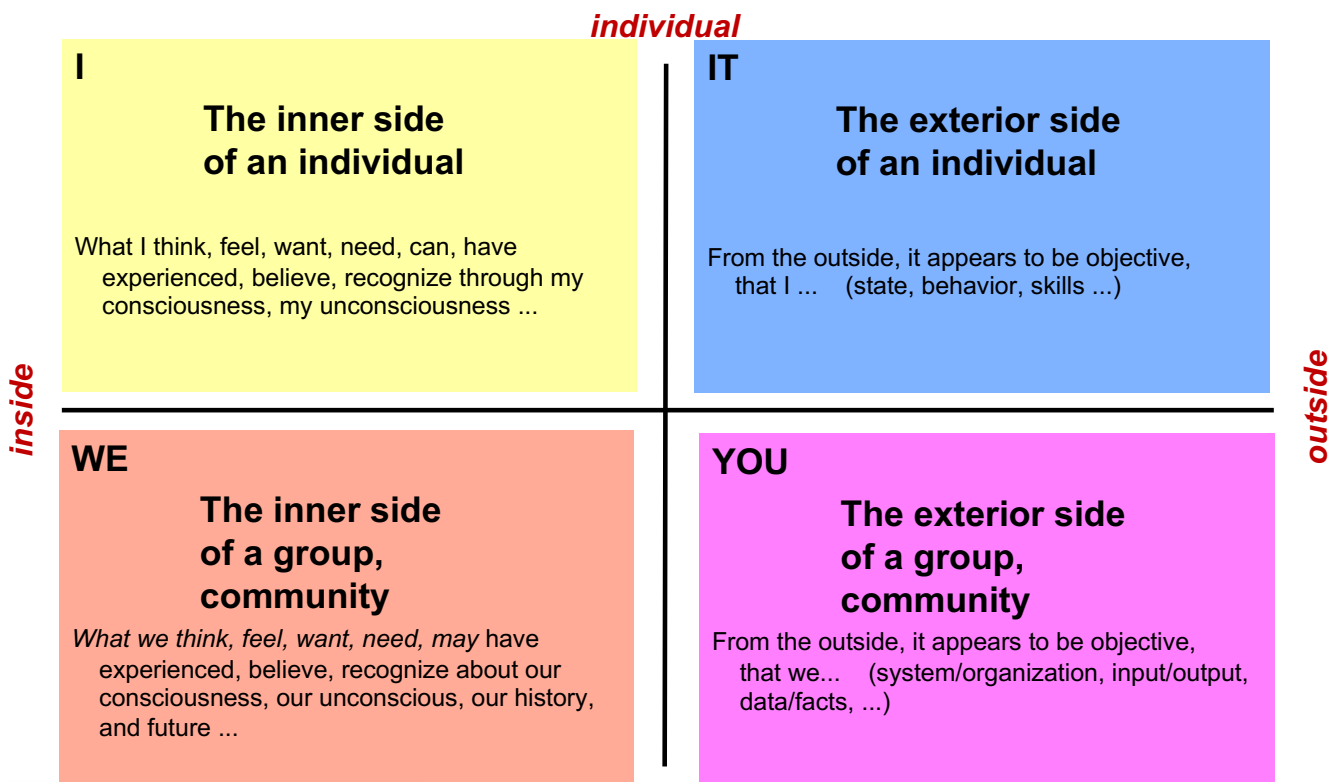
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Four perspectives of life (by Ken Wilber)



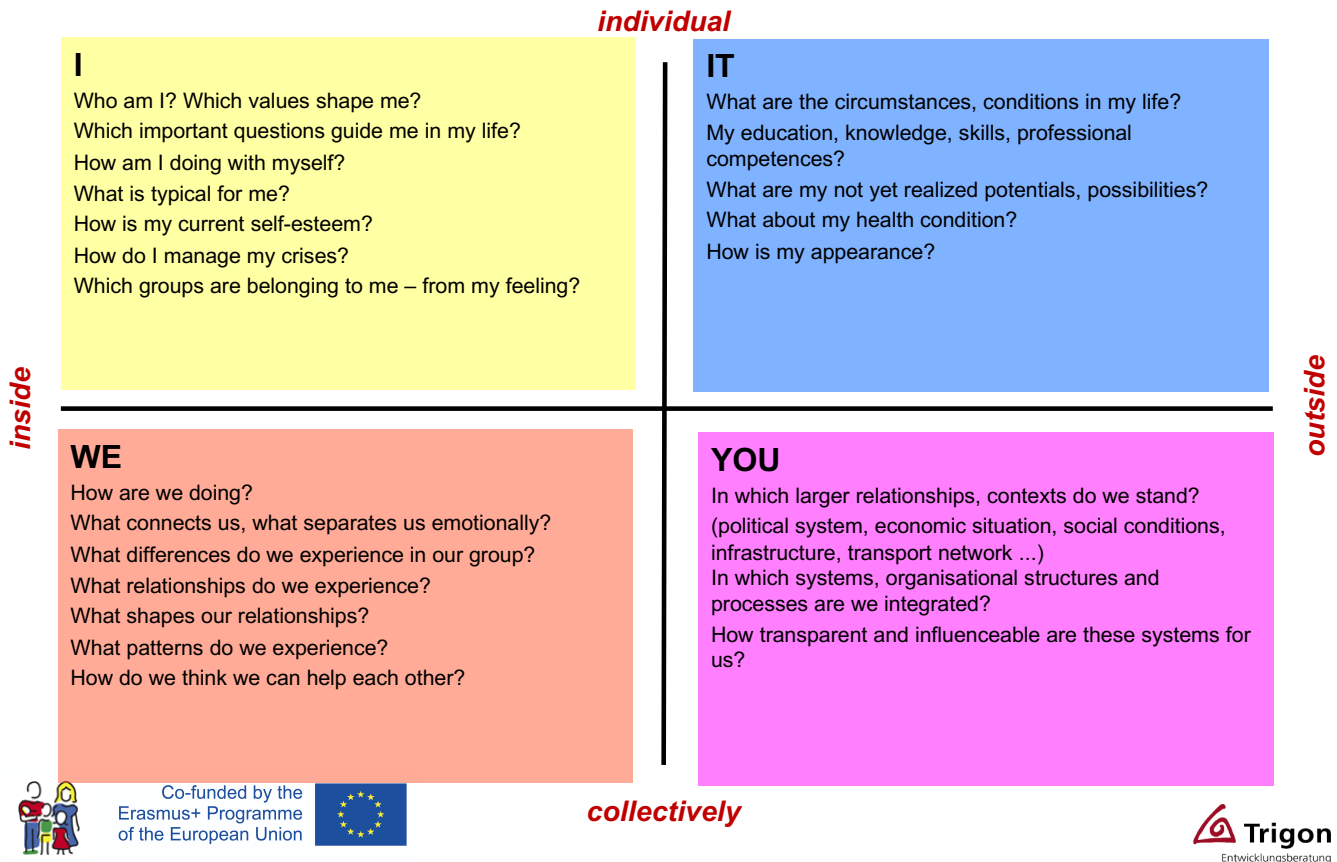
Co-funded by the
Erasmus+ Programme
of the European Union



collectively



Four perspectives of life (by Ken Wilber)



2 Looking at the situation - also from the outside - with open widened view

a) Single (10 min)

When you think of your question...

Which **1-3 situations** in your life do you have spontaneously vivid and as a picture before your eyes?

b) Exchange in trios (3 x 10 min)

A describes the situations briefly and concisely and establishes the reference to the question.

Why do I choose exactly these situations?

What are they saying for me?

What is particularly important to me?

B and **C** listen, observe and add their own associations.

How does the situation/question present itself from the perspective of other stakeholders in the system? Other aspects! Dialogue about it.



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung

Trigon
Entwicklungsberatung

3

Turn around, inwards

a) Individual work (10 min)

Exploring my inner place

How do I look at the question? What do I question, what don't I question?

What hypotheses am I unconsciously based on?

What are my own patterns of thought and action, my mental models.

What position do I take?

b) Individual work (5 min)

What's up with me?

What is not possible by what I am actually looking for?

Which of my abilities I cannot use, not bring into the world?

What are neglected parts of my personality?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Between 3 and 4

When I get that distance... (5 min)

Does this change **my initial question**?

How? Does it dilate, constrict?

Which facets gain importance?

What changes when I look at the whole from a super-personal higher perspective?

Can I make the question clearer, more precise or perhaps reformulate it for myself?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



4

Sensing: Experiencing my own feelings

a) Individual work (15 min)

What is the current situation?

Paint a picture of the situation you feel you're in ... standing
f.e. in the metaphor of a river landscape -
Let it flow...

b) Individual work (10 min)

What am I experiencing?

What feelings are coming up? What is touching me particularly?
What am I feeling in my body?

Perceive with all your senses!

Make notes



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



5

Let go: Opening and loosening your own will (30 min)

Let go of the experienced process, but let it resonate

Do something completely different, stress-free (!) without having to stop completely
in consciousness ... make your soul work

to go for a walk alone and reflect

lie on the bed

paint

swimming, bathing, showering

knit

polish shoes

unpack suitcases

...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Intuition

- The best ideas come unexpectedly ... showering, hiking, reading...
In a relaxed state when I'm all ME
- The flash of inspiration occurs when I am "in" a topic,
i.e. more deeply emotionally connected
- The "saving idea" often seems poetic at first, sometimes simple-minded,
amateurish
- In a "flash of inspiration" the wholeness becomes visible



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



6

Becoming aware - letting future impulses rise within and consciously grasping them (Presencing) (30 min)

Meditative way:

1. I relax and expand
2. I go into the gesture of humility and adoration
3. I enter the world of ideas
4. I bring my question, the diagnosis, my feelings
to the inner eye and deepen me
5. I create inner concentrated free space
6. I see what's happening
7. I thank and say goodbye
8. I take seriously in what happened and connect it with my question

Or: "Increased Silence"



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



7

Let me come (10 min)

Please write down as spontaneously as possible ...
(No interpretations!)

- What have I seen?
- What do I see before me?
- Who or what came into my head?
- What feelings have come over me?
- What touched me in particular?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



8

Compress

a) Individual work (15 min)

Please create a fictitious report in 2020,
by assuming that what you are striving for has already been achieved:

- This is my professional environment...
- That is achieved...
- I work with these colleagues...
- These are my main activities...
- This is what my private surroundings look like...

b) Exchange in trios (3 x 10 min)

The best intentions are usually thwarted by ourselves. That's why I send my plans to the shaking line:

- What objections could I object to myself not to start in the first place?
- What could I do to stop or distract myself again?
- What could be done by others to thwart my plans?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



9

Bring out (10 min)

Concrete, short-term actions

According to the Chinese motto:

"Even the greatest journey begins with the first step",
it is now a matter of taking the first concrete steps towards realisation.

- What will I do in the near future to get closer to the goal?
- What will I refrain from doing in the future, i.e. not doing any more?
- What skills do I want to develop?
- Which verifiable interim targets/stage goals do I set myself?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



10

Trial

Regularly document your experience in implementation

- What succeeds?
- What to do less?
- Why?
- What can I change to open up further possibilities?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



11

Anchoring

Review after 3 months:

What have I set myself?

What was important to me?

Where do I stand today?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Presencing

**Structured approach
in organisational innovation and change processes**



Co-funded by the
Erasmus+ Programme
of the European Union

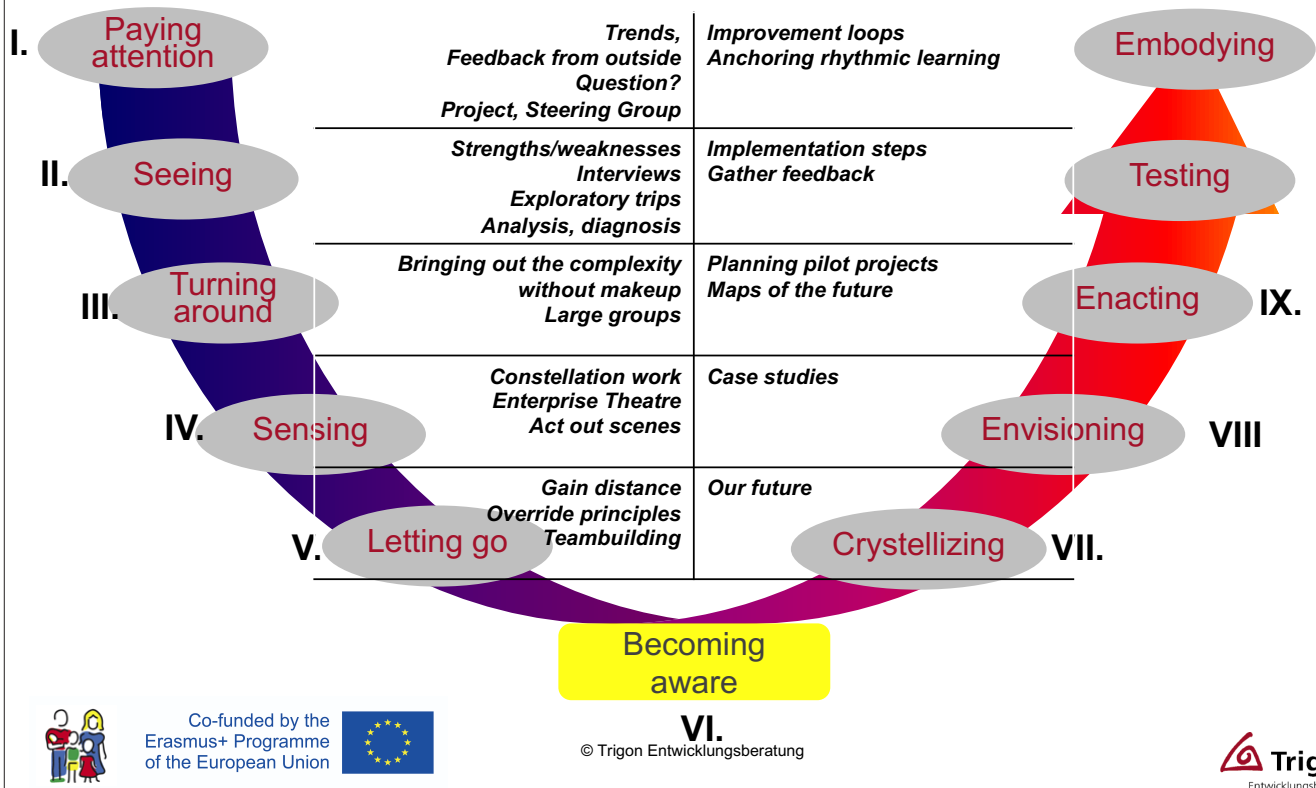


© Trigon Entwicklungsberatung



Methodological instruments in the U process

Organizational change



I. Form intention: Work steps

1. What is the intention with regard to the whole?
What do people who are having an interest in the organisation report back to this intention - even if they are not directly related to the topic?
2. How does the intention expand, if I start from the point of view of the highest future possibility of the persons concerned?
What is then the intention?
3. Who could further represent the upcoming intention with personal professional competence, quality of heart, passion, power and commitment?
Which people from the environment could still be meaningfully involved and make a valuable contribution?

I. Paying attention

Form a common intention

1. Mindfulness - What comes from the environment?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Where do I stand myself?

What are my own life and career goals? Am I really going after them?

1st past

- 1.1 Which goals have I set myself over the past year ... in the longer past?
- 1.2 How did I actually deal with them?
- 1.3 Which goals helped me in my life?
- 1.4 How did I find my way to these goals?

2nd future

- 2.1 What are my goals for the next year?
- 2.2 How will I deal with them?
- 2.3 Which hurdles do I already see on my way?
- 2.4 Where can I get support?

3. fellow human beings

- 3.1 What do I know about the objectives of my coworkers, colleagues?
- 3.2 How do I deal with them?
- 3.3 If we exchange ideas, am I supporting, confronting?
- 3.4 What do I want to intensify?

4th organization

- 4.1 How do my goals fit in with those of the organization?
- 4.2 Are these contradictory to each other or consistent?
- 4.3 Are targets top down, bottom up, in dialogue developed?
- 4.4 What does this mean for me?



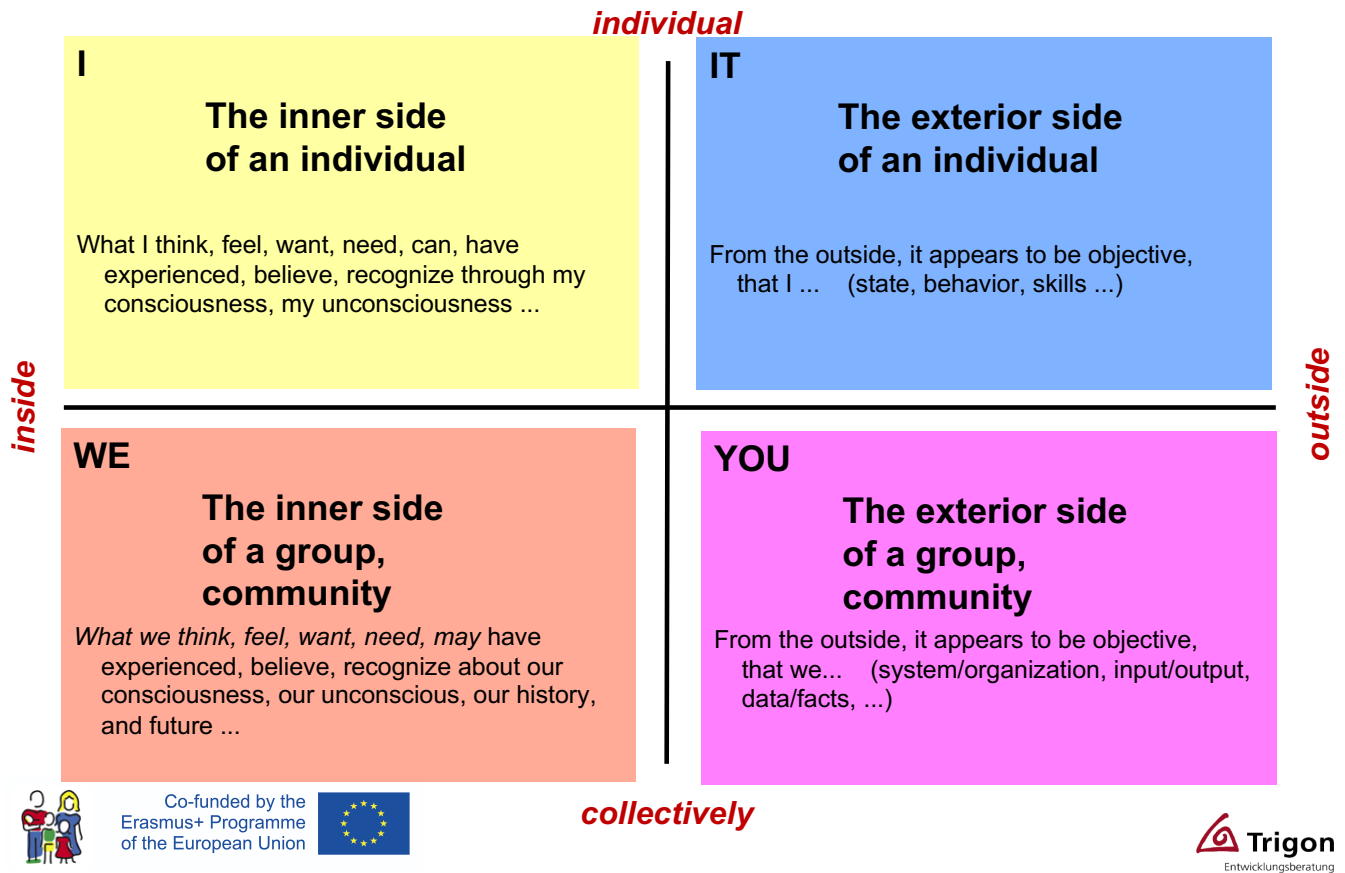
Erasmus+ Programme
of the European Union



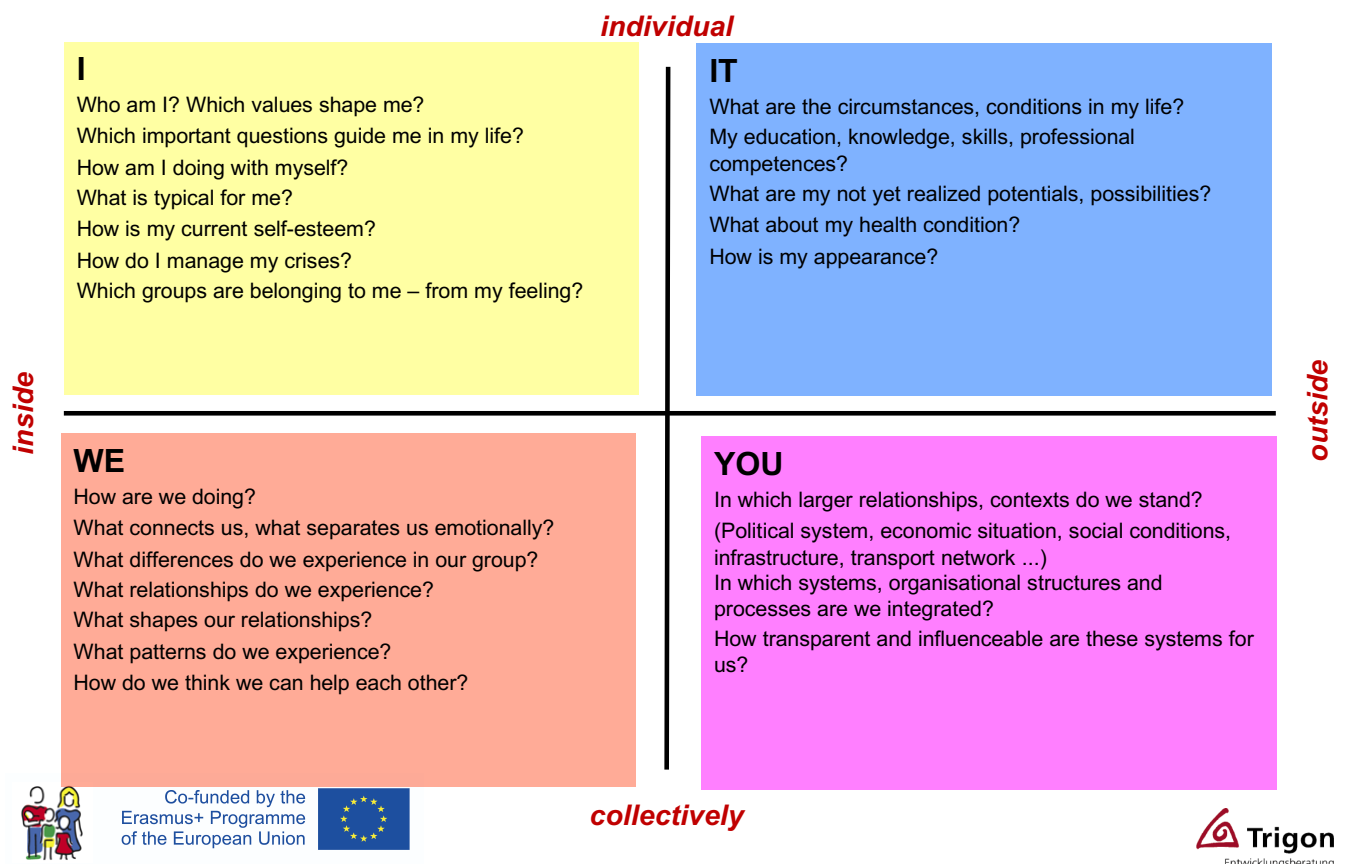
© Trigon Entwicklungsberatung



Four perspectives of life (by Ken Wilber)



Four perspectives of life (by Ken Wilber)



Important trends and developments in the relevant markets

Detecting even weak signals

Trends and developments

Importance for your
company
0=insignificant
3=very significant

Try to concretize the trends that
are important for your
company



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Strategic analysis: comparison with competitors

Competitor:

1= decisive advantage
2= big advantage
3= slight advantage
4= slight disadvantage
5= big disadvantage
6= decisive disadvantage

Key market strengths and weaknesses	1	2	3	4	5	6



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What is the question of organisation in our view here and now?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



I. **Paying attention** **Form a common intention**

1. Mindfulness

2. **Forming relationships** - by listening, listening - including yourself - recognizing what appears - from me, from others, between me and others and the environment - as an impulse for the future



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Brainwriting method 635 - form

6 persons - 3 suggestions each - 5 minutes time each

- **Problem definition:**
- **Notes:** Identify yourself with the proposal of your predecessor
Develop the suggestions of your predecessor further
Please write clearly

	Proposal 1	Proposal 2	Proposal 3
1			
2			
3			
4			
5			
6			



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The four rooms of change

Identify in each field the 5 most important moods that live in our area today

1
**Room of
security,**
Clarity,
contentment

2
**Room of
irritation,**
ambiguity,
insecurity

4
**Room of
future,**
necessary
next steps

3
**Room of
emotions,**
feelings,
needs

Please enter one by one
each of the rooms and write
down what you think is
important.

Take note of the already written
messages and confirm them
(exclamation mark) or relativize
them (question mark) from your
point of view.



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The Phoenix checklist for problem identification

The Central Intelligence Agency (CIA) uses a checklist, to stimulate their agents, a problem or a challenge from many different angles.

The questions contained therein may also serve as a basis for corporate management, to better grasp problem situations.

It is useful to evaluate them according to your own experience to be added or changed.

Literatur: Michalko, M.: Thinkertoys - A. Handbook of Business Creativity for the 90th
- Berkeley : Ten Speed Press 1991



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The Phoenix checklist for problem identification

1. Why is it necessary for us to solve the problem?
2. What benefit does a solution to the problem bring us?
3. What is unknown to us?
4. What is it we don't yet understand?
5. What information do we have?
6. What's *not* the problem?
7. Is the information sufficient? Or is it insufficient? Or redundant? Or contradictory?
8. Can and should we describe the problem in a diagram? In a figure? Can it be quantified?
9. Where are the boundaries of the problem?
10. Can we separate the problem into partial problems? Can we write them down? How are the parts of the problem related to each other?
11. What are the influenceable variables of the problem?
12. Have we seen this problem before?
13. Have we ever seen a similar problem before?
14. Do we know of any related problems?
15. Can we think of a familiar problem having the same or similar unknown quantities?
16. Assuming there is a related problem that we have already solved - can we apply the methodology?
17. Can we rephrase our problems? In how many different ways can we describe it?
Can it be generalized or specified? Can rules be changed?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What is
the question of organisation
in our view
here and now
more concrete, clearer, more specific?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



I. Form a common intention

- 1. Mindfulness**
- 2. Relationships**
- 3. Form a space** in which the intention is enlivened and held (core group)



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



I. Pause

Form a common intention

1. Mindfulness
2. Relationships
3. Space
4. **Form a team**, which as a project group is responsible for prototyping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Preparations in a core group

Task definition:

- What is our exact work assignment? Expected results? How long ago?
- What freedoms in the process? What resources are available?
- What backing/anchoring/support is there in the system?
- What limits must be observed?
- What connections are there to the existing hierarchy?
- How should the project group be found? According to which criteria?
- Are there any binding milestones? As regards content? Appointment?
- How, when and about what the system should be regularly informed?

Self-organisation:

- What skills do the members of the LG bring with them?
How do they complement each other in terms of work style, temperament, learning style ...?
- Should the group have a leader? If so: Who, with what tasks?
- What are the rules of cooperation?
- How often does the LG meet? At what pace?
- How much work can be done individually outside the LG work?
- Can I be released from ongoing tasks?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



II. Have a look at

1. Mindfulness
2. form relationships
3. vessel
4. Responsible team
5. **Go on a journey of discovery** to the places of greatest possibilities



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Dialogue interviews (conducted with managers) to C. O. Harmers

- Describe your most important leadership experiences that brought you to this point.
- How did you meet significant new challenges and what helped you to cope with them?
- Describe your best team experience.
How does it differ from your other team experiences?
- What are the three most important challenges you are currently facing?
- What are your most important interest groups?
- On the basis of which results is your performance considered a success or a failure
- and in what time horizon?
- What do you need to let go of to be successful in your current leadership role?
What do you need to learn? What conditions do you need to develop?
- How do you develop your team? What do you need from your team and
what does your team need from you?
- Which criteria will you use to evaluate,
in case you will be successful in nine to twelve months from now?
- If you think about our conversation now and listen to your inner voice:
What important question arises in you?
What can you deduce from this conversation for your immediate future?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Stakeholder interviews (conducted by internal managers with e.g. customers)

C. O. Scharmer

- What is your most important goal and how can I help you to achieve it?
What for do you need me?
- Which criteria will you apply to evaluate,
whether my contribution to your work has been successful?
- If I were able to change two things in my area of responsibility that would have an impact on you within the next six months : Which two things would you appreciate most? What would benefit most?
- Which barriers in the current systems or regulations have made it difficult
- for those responsible in their role - to meet your expectations?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Sensing Journeys

- Exploratory trips close to or outside the industry

as an opportunity to experience one's own system through the eyes of the various interest groups:

- A small group is assigned to go to different places in the system and explore how the conditions are there.
It is precisely this unfamiliar territory that should be entered...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



II. Have a look at

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Create a condensed **diagnosis and analysis**



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



S P O T - Analysis extended in 8 dimensions

**Satisfactions -
strengths**

**Problems -
Weaknesses**

**Opportunities -
Chances**

How can we build on
and use our strengths
to seize our
opportunities?

How to reduce our
weaknesses so as not
to ruin our chances?

**Threats -
Dangers**

How to develop and use
our strengths in such a
way that we can master
future dangers?

How to transform our
weaknesses so that
they do not become our
undoing in future
dangers?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



III. turning over

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Condensed diagnosis and analysis
7. **Listening and dialogue**
Opening up his thinking, feeling and willing in communication
To work out and recognize the meaning of the situation in a vivid way



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Large group - work with clinics (concise case studies)

- 2 days in a suitable room
- Most important 20 - 100 personalities from all areas
- Table groups 6 - 10 persons

Objective:

- In each table group: The question/challenge of the organisation is illustrated with real, concise case studies
- Developing concrete innovative ideas
(Experience of a shortened U-trial)
- Develop common positive energy, especially confidence in one's own strength



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Methodical additions

- Storytelling: successful and unsuccessful team or project experiences
- Official/ unofficial rules of the game
Front stage/back stage
- Still images, slide series
- Personalize: Profile of the company personality
- Tips for job applicants
- Emotional resonance
- Painting a river landscape
- Colour diagnosis



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



IV. Tracking

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Condensed diagnosis and analysis
7. Listening and dialogue
8. **Looking at oneself from the outside** - developing collective organs of perception



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



From the perspective of the future understand the phenomena

- Work in the core group/project group
- **Positioning** in polarities/quadrants
- Formulating the voices of my **inner team** (Schultz von Thun)
- Lively staging by a professional group of **corporate theatre** with Live Coaching/Live Communication
- Work with **pictures, painting**
- Feeling yourself in the situation: **bodywork**

- Creating drama
- Elicit concern

- Showing what is apparently necessary



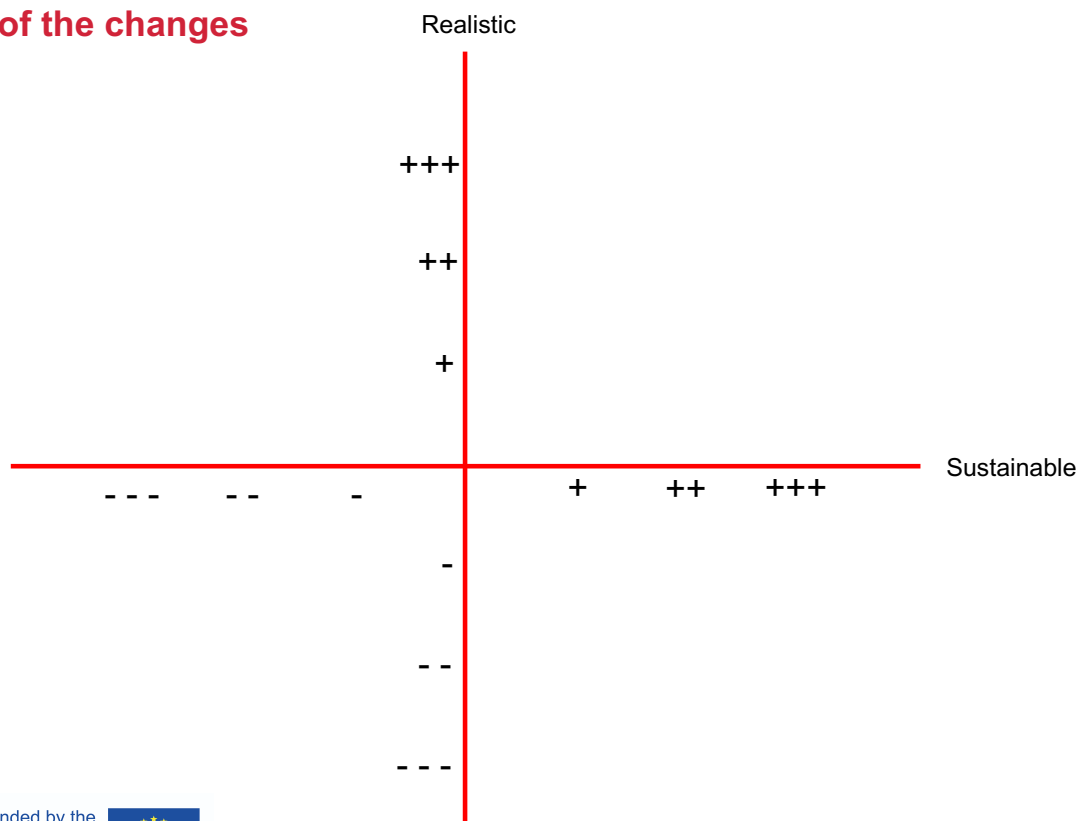
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Acceptance of the changes



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



V. Let go

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Condensed diagnosis and analysis
7. Listening and dialogue
8. Looking at oneself from the outside
7. **Letting go of** all that is not needed



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Let go

- Allowing moments of emptiness to arise, gaining distance, doing nothing, getting out, changing location, renunciation
- 2 weeks thematic break, 3 days free time
- Override something, for example
 - Valid principles
 - Folder with organization instructions
 - Current rules of communication
 - Structures
 - Status symbols (parking, ...)



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



VI. Becoming aware

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Condensed diagnosis and analysis
7. Listening and dialogue
8. Looking at oneself from the outside
7. Letting go of all that is not needed
8. Come alive



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Intuition, common will formation

Which **task/possibility do I have** in connection to my organization?

Increased silence - Connecting with your source

Listen to your inner voice

Experiencing the authentic self

Perceiving the future field

The highest future possibility in the Community
arise and become present

Entering a **future space**; walking through an imaginary door



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



VII. Letting come

1. Mindfulness
2. Relationships
3. Space
4. Responsible team
5. Journey of discovery
6. Condensed diagnosis and analysis
7. Listening and dialogue
8. Looking at oneself from the outside
7. Letting go of all that is not needed
8. Come alive
9. **Working out the picture of the future** and connecting with it power



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Sharing and anchoring the vision of the future

- Work on the **individual impulses, images**
- What is common, what is mutually exclusive?
- Consciously connecting with it **as a core group**
- Increased **team building** in the core group

- Tell biographies
When, under what circumstances and where have I already had intuition experiences in my biography?
- When, how, under what circumstances have breakthroughs been achieved?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



VIII. Compress - XI. Anchoring

12. Develop **case studies** for individual questions
13. Develop **prototypes** as maps for the future
14. Penetrate the new with your **thinking, feeling and wanting**
15. Use **recurringly improvement loops**
through feedback from the organization, the environment
19. Create **meeting places**, in which solutions from the emerging
be developed and reflected upon as a whole
20. Design and anchor **structures of rhythmic learning and reflection**
21. **Making** the Presencing method **visible** to the **outside** and transporting it



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Develop and implement a model of mission statements

2.07

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



https://www.ted.com/talks/george_monbiot_the_new_political_story_that_could_change_everything#t-12137



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



International research proves: **The purpose of a school profile**

- In remarkable good schools
a **high degree of coherence** in the behaviour of teachers
i.e. the colleagues live according to a few common guiding principles
- Process of **constant self-renewal** of the school is focused and
is part of the self-conception
- The sharing of values, perspectives of meaning creates the **possibility of identification**, support, prevents the burn-out syndrome
- **Relief** for many everyday problems, because of the common orientation
- Not extra work, but original **assurance of quality and effectiveness**



Co-funded by the
Erasmus+ Programme
of the European Union



Models of mission statements **Examples**



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Example of a school profile

(H. Bieger. School life as a school program - primary school Schwartbuck.
Journal for School Development 2/1997. Innsbruck-Vienna)

- *We want a partnership, friendly and peaceful interaction between everyone in the school, girls and boys, age groups, students and teachers, staff and parents.*
- *We want to strengthen the self-esteem of every single child and encourage them to be independent.*
- We want to help the children to get to know themselves and their very own possibilities and to accept *their individual capabilities*.
- *We want to work to promote and strengthen social behaviour: Agreeing, accepting, abiding by rules and agreements.*
- *Taking into account* the rights and needs of others, being able to respond to others, recognizing and respecting the distinctiveness of others - working for those in need - humility, politeness.
- *We accept conflicts and take the time to resolve them: outlawing the use of physical violence in all disputes between children.*
- Improving *language skills* - Strengthening the ability to compromise
- *We want to overcome gender prejudices and barriers and develop the ability to learn, work, play and accept each other.*
- We want to create space to take *responsibility* for ourselves, for other children, for the things entrusted to us, for nature and the environment around us.



Co-funded by the
Erasmus+ Programme
of the European Union



View over the fence

Association of schools committed to reform education since 1989

Extract from the Bensberg Declaration 2010:

All children and young people should be able to develop in the school environment, learn with pleasure and achieve the best possible results.

We know

- Children and young people need encouragement, confirmation, recognition and their own time. Pressure and fear destroy motivation.
- They need reliable adults and a lively community. They need meaningful and challenging learning experiences.
- Schools need the courage to recognise children as experts in their learning. Teachers need the courage to encourage children to learn and not just to teach subjects.



Co-funded by the
Erasmus+ Programme
of the European Union



In the school profile of a Waldorf school ...there are statements about...

- How can Waldorf Education be realised at this location?
- What does holistic learning with head, heart and hand mean here?
- What are the guiding ideas that shape the lower, middle and upper school?
- What is the importance of project teaching?
- What does "learning to learn" mean?
- What should enable the talents of young people to develop?
- What does self-organised learning mean for grades 10-13?
- What is the school's position on state qualifications?
- What is the relevance of internal communication and cooperation?
- How does the school intend to guarantee pedagogical quality?
- How do parents, teachers and pupils work together?
- What decision-making powers are allocated in which organs?



Co-funded by the
Erasmus+ Programme
of the European Union



Model of the R u d o l f S t e i n e r School, K r e u z l i n g e n

1. We give children time.

Continuous and comprehensive education instead of early selection
Learning and gaining self-confidence without stress and exam nerves
Discover, train and maintain existing facilities (strengthen strengths!)
Develop courage, initiative and strong roots
Preserving childhood as a protected space

2. We work with modern learning concepts.

Epochal and block lessons allow an intensive immersion in topics
Self-designed teaching materials promote the internalization of what has been learned
Practical application of knowledge outside the laboratory situation of the classroom
High value of artistic and craft activities
Secure prospects for university entrance and graduation (from toddlers' group to school-leaving certificate)

3. We overcome borders.

Meeting place for Swiss, German and host families from all over the world
International network with over 800 schools in all regions and cultures
Promotion of world interest, tolerance and intercultural competence
English and French from the 1st class onwards
Bilingual teaching phases in the middle and upper school

4. We develop initiative.

Parents and teachers as entrepreneurs and school developers
School development under our own direction
Joy at work instead of a compulsory programme
Financing the school through parental contributions, donations and charity campaigns
Promotion of civil courage and drive instead of a consumer mentality

5. We offer an intact social environment.

Manageable, familiar school operation
Open discussion culture and solidarity
Attentive and loving attention to the children
Clear boundaries and rules of the game in dealing with each other
Extensive security against problems of violence or drugs



Co-funded by the
Erasmus+ Programme
of the European Union



Das Prinzip Garage.

Geh davon aus, dass du die Welt verändern kannst.
 Arbeite schnell – ganz egal, wann.
 Bleibe flexibel: arbeite allein oder im Team – je nach Situation.
 Teile alles mit deinen Kollegen: Arbeitsmittel, Ideen, Probleme.
 Keine Machtspielen. Keine Bürokratie.
 Radikal neue Ideen sind zumeist gute Ideen.
 Liefere jeden Tag Ergebnisse. Sind sie überzeugend, verlassen sie die Garage.
 Denke immer daran:
 Es ist der Kunde, der darüber entscheidet, ob ein Job gut gemacht ist.
 Und vergiss nie: Gemeinsam kann man alles schaffen.
 Sei erfinderisch.



Co-funded by the
Erasmus+ Programme
of the European Union



The “garage“- principle

- Believe you can change the world.
- Work quickly, keep the tools unlocked, work whenever.
- Stay flexible: work alone or work together – as the situation needs.
- Share — tools, ideas. Trust your colleagues.
- No powergames. No bureaucracy. (These are ridiculous in a garage.)
- Radical ideas are mostly good ideas.
- Make a contribution every day. If it doesn't add value, it doesn't leave the garage.
- Always keep in mind: It is the customer who defines, whether a job is well done.
- Never forget: Together we can do anything.
- Be creative in inventing new ways.



Our shared values

We are passionate about customers.

We put the customer first in everything we do.

We have trust and respect for individuals.

We approach our work with the belief that people want to do a good job—and will do so, when given the right tools and support.

We perform at a high level of achievement and contribution.

We are relentless in implementing better ways of getting results.

We act with speed and agility.

We achieve results at a rate faster than our competitors.

We deliver meaningful innovation.

We are the technology company that invents the useful and the significant.

We achieve our results through teamwork.

Effective collaboration is key to our success.

We conduct our business with uncompromising integrity.

We are open, honest and direct in our dealings.



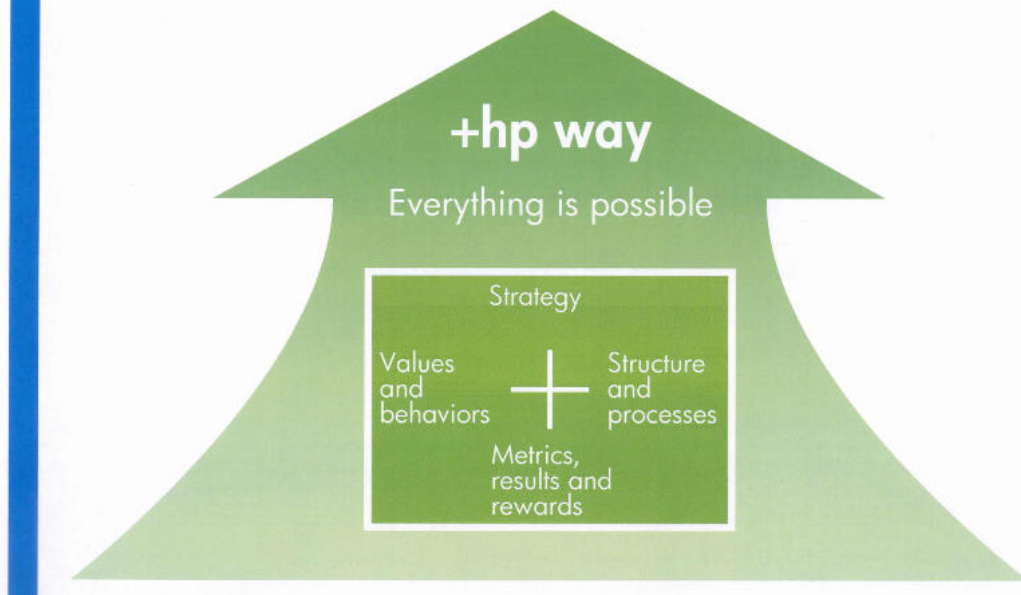
The way we get things done



Co-funded by the
Erasmus+ Programme
of the European Union



Character + capability: How we do things is as important as what we do



Co-funded by the
Erasmus+ Programme
of the European Union



Management model

Our managers are responsible for competent management.

- We expect them to think holistically, to continuously develop our objectives and our organisation so that the interests of our customers can be taken into account in the individual tasks.
- Our managers act as role models for mutual information, communication and cooperation at and between all levels.
- Further essential management tasks are to formulate comprehensible goals and clear assignments and to monitor their fulfilment in an appropriate form.
- Our managers support their employees in performing their tasks and feel responsible for their further development.
- They promote motivation through respect, humanity and leadership behavior appropriate to the situation.
- It is the task of our managers, above all, to recognize conflicts and ensure that they are resolved positively.
- Employees with high professional and problem-solving competence may expect the assignment of tasks for responsible transfer.



Co-funded by the
Erasmus+ Programme
of the European Union



Investing in the business continued

Investing in the brand

Hiscox believes that a strong brand will help sell its products throughout the world.

The brand is built on the behaviour and performance of employees. It is only highlighted by marketing and sponsorship.

Linking into the brand are Hiscox's values. Regularly appraised by staff, these values are constantly evolving.

Challenge convention

There is always a better way.

Integrity

True to our word.

Respect

Decisive in decision, considerate in execution.

Courage

Dare to be different.

Quality

Good enough is not enough.

Excellence in execution

See it through, thoroughly.

"Our mission is simple: develop the Hiscox brand through a powerful combination of flexible underwriting and superb service, backed by innovative marketing."

Steve Langan, Managing Director, Hiscox UK



Co-funded
Erasmus+ Prog
of the European



Philosophy of a coffee roaster

Coffee roasting Rechenauer
Craftsmanship. Enjoy. Tradition.

- Who works with coffee, the spice of the brain, the food of reason and peaceful luxury food, must convince through quality and ethics.
- What is sold cheaply must have been produced cheaply - but to whose disadvantage?
- Whoever lives in a rich country has an ethical obligation. As a small company we can only be successful in the market, if the quality of our offer is right.
- We assure our customers:
We will ceaselessly fight against the alliance of the big players, against exclusion of competition, against poor quality and uniformity of taste, against price dumping and exploitation.
- We hereby call upon you to rethink, to more social justice.
- We are highly motivated to achieve this with up-to-date information and new ideas, toughness and passion.
- All this in the sense of a fair competition culture, ecology and last but not least a higher morale.

With the best beans,
Coffee roasting Rechenauer
Manuela and Klaus Peter Rechenauer



Co-funded by the
Erasmus+ Programme
of the European Union



Theoretical aspects



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



A model ...

Is

- a picture of the future we aspire to
- a draft identity of the organisation
- a compilation of integrative guiding ideas

Necessary

- to bring out what is unmistakably special
- describe the future in an ideal way
- pointing the way, giving orientation for change
- making sense, motivating

Has to

- be honest and able to reach a consensus
- be multicoloured, but coherent in itself
- be concisely and clearly formulated
- have a form that corresponds to the content



Co-funded by the
Erasmus+ Programme
of the European Union



Statements in a school profile

Pedagogical concept

- Central values, ideas, Qualities for lower, middle and upper school
- Benefits for our students
- Relationship to parents

Internal resources

- Attitude, posture
- Previous professional experience



External relations

- Significant trends in the environment
- Cultural, political and social self-image
- Responsibility of the school

Leadership and cooperation

- Special skills, knowledge
- Social conception
- Forms of cooperation, networks ...



Co-funded by the
Erasmus+ Programme
of the European Union



Resolve a dispute between the claims

Ideas in the mission statement should be ...

Multi-perspective

mutually reinforcing

complex

like a piece of the cake

forward-thinking

attainable

ideal-typical

workable

action-oriented

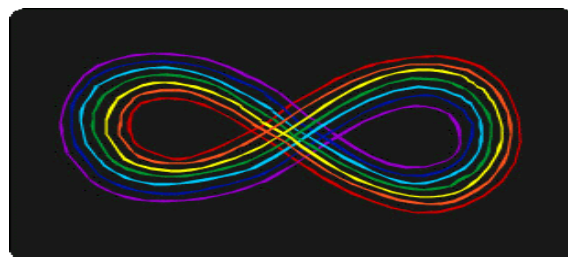
able to reach a consensus

capable of development

coagulated once

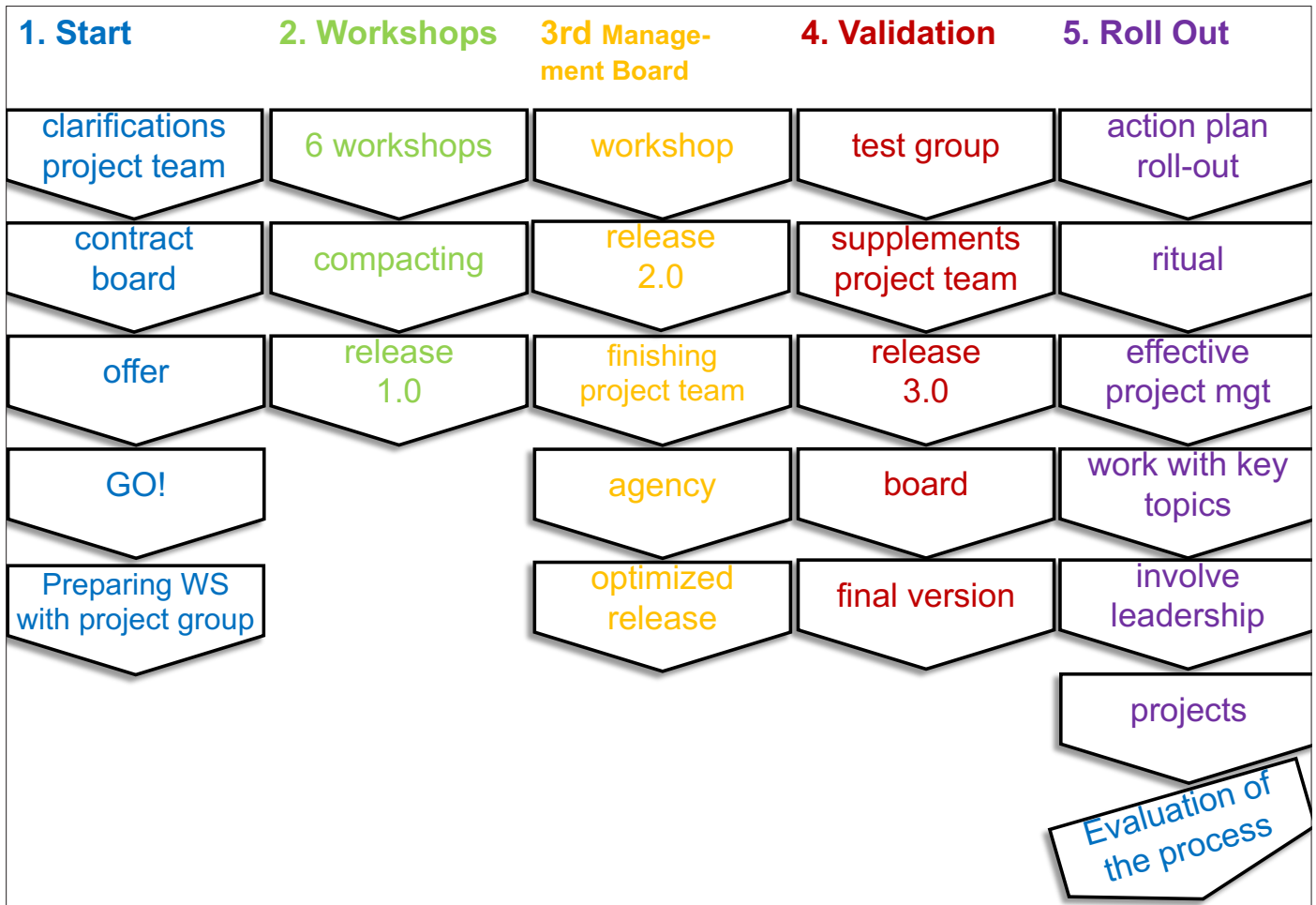
enunciated

no house rules



Co-funded by the
Erasmus+ Programme
of the European Union





Organization development for Estonian schools

Training for school board trainers

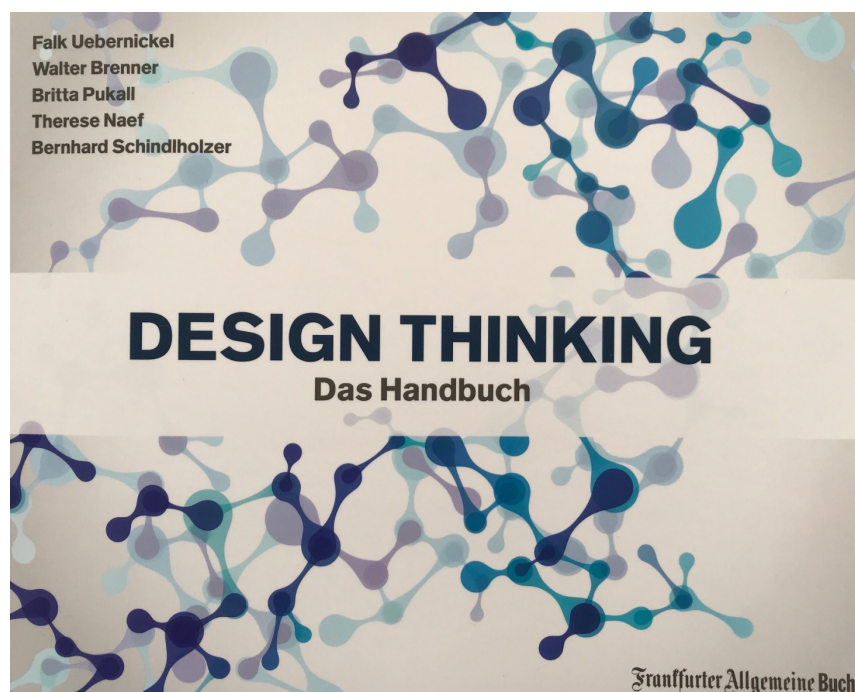
Design thinking

2.08

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



Co-funded by the
Erasmus+ Programme
of the European Union



4 x Design Thinking

as culture, philosophy, mindset

=

principle-driven innovation processes for products, services and business models

as a toolbox

=

a large number of different methodological approaches and tools exist

as micro-process

=

structured method to design innovation processes for a question in a group quickly and comprehensibly

as a macro process

=

design approach for an organization-wide OE/change process



Co-funded by the
Erasmus+ Programme
of the European Union



design thinking

- People from different disciplines work in an environment that encourages creativity
- You develop a question together
- This question considers the **needs and motives of** users (customer centricity).
- Developed concepts are tested several times by prototypes, on which feedback is sought
- Role model: Work of designers as a combination of Understanding, Observing, Finding Ideas, Refining, Executing, Learning
- Also used for service development, as boundaries between products and services become blurred.

see Stickdorn, M., Schneider J.: *This Is Service Design Thinking*



Co-funded by the
Erasmus+ Programme
of the European Union



Starting point Customer centricity

	product centric	client-conscious	client-orientated	client-centric
School of thoughts	<ul style="list-style-type: none"> The customer is the passive recipient of our services. We know best what he needs. Customers don't know what they need. 	<ul style="list-style-type: none"> We segment our customers according to demographic characteristics so that we can more easily convince them to buy our products/services. 	<ul style="list-style-type: none"> We understand the needs of our customers so that we can align existing products/services with them. We work together with our customers and integrate them into our innovation processes. 	<ul style="list-style-type: none"> We understand our customers deeply and holistically in order to max. adjust products to them and to develop new products. If necessary, we separate ourselves from the existing products.
focus	products, services, capabilities = output: first product/DL, then customer	customer segmentation, marketing	customer requirements	customer needs, will and ability of the organization to respond to them

technology drivers

market readers

need seekers



Co-funded by the
Erasmus+ Programme
of the European Union



Source: Simplicity



Design Thinking Mindset

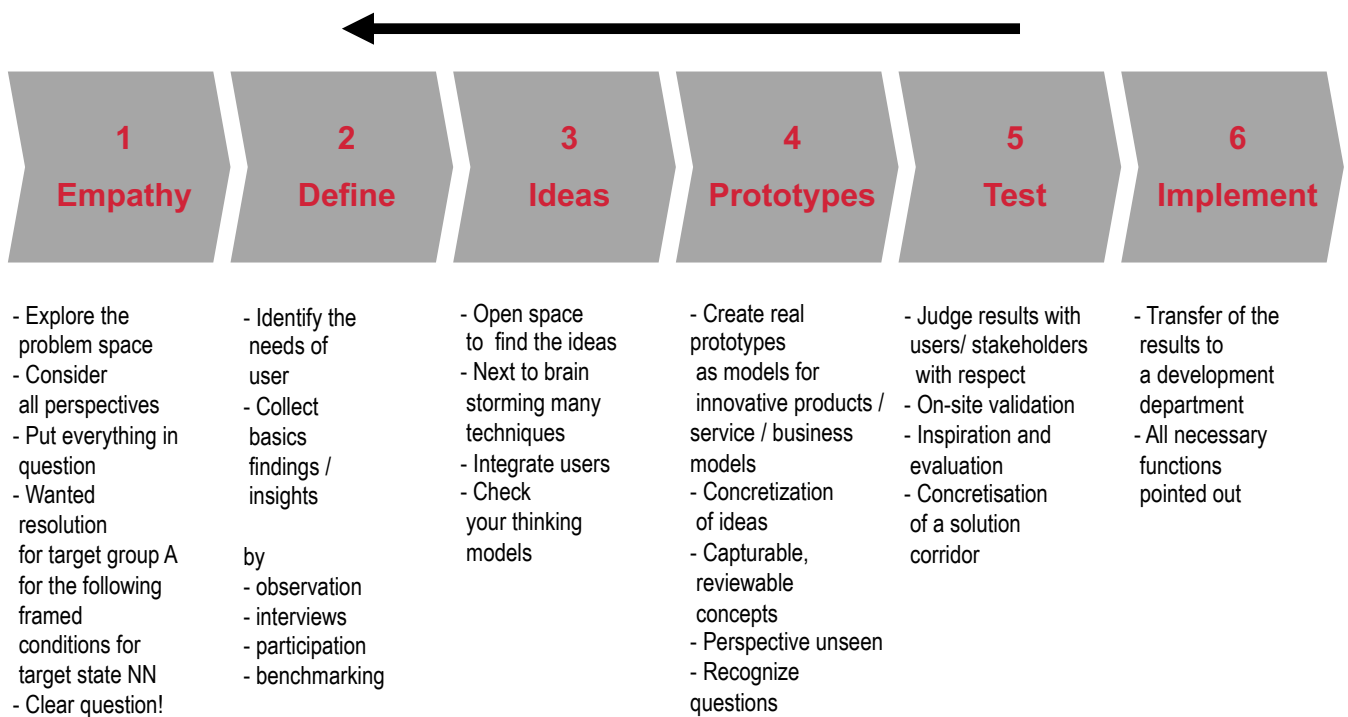
- Always take the focus of the user
- Include the stakeholder perspective
- Playfully, curiously working on questions and developing solutions
- Absolutely cooperative behaviour – no space for competition
- Reframing - Expand the framework - Put everything in question
- Let yourself be surprised by everything that is possible - Every idea is valuable
- Illogical, unattainable ideas are welcome!
- Mistakes are part of innovation
- Pay close attention to a straight process
- Action-oriented solutions are in demand
- Work in short cycles



Co-funded by the
Erasmus+ Programme
of the European Union



Design Thinking (micro-process)



Co-funded by the
Erasmus+ Programme



Materials (selection)

crepe paper	mug	Lego
cartons	felt	Playmobil Dolls
coloured paper	disposable cutlery	toy
paper rolls	rope	Kapla Stones
Post its	cord	balls
Tesa Crepe	wool	periodicals
glue sticks	ribbons	carpet knife
tape	aluminium foil	scissors
felt-tip pens	pipe cleaners	cutting mats
cards	polystyrene	ruler
color dots	paperclips	tape measure



Co-funded by the
Erasmus+ Programme
of the European Union



methods



Co-funded by the
Erasmus+ Programme
of the European Union



Our exercise here: The wallet of the future

1. Form duos
2. Show your wallet / credit card storage today
3. Interview each other about how you use your wallet today.
What are your special needs?
What do you appreciate about your solution today?
What else would you like to have in the future?
What "crazy" idea comes to your mind? 15 min
4. Individual work = brainstorming with questions about the future user 5 min
5. Each one creates a prototype 15 min
6. Reciprocal introduction and feedback
Pick up ideas for further development 2 x 5 min
7. Possibly improve the prototype 5 min
8. Reflection of the process in duo 5 min
9. Exchange in plenary



Co-funded by the
Erasmus+ Programme
of the European Union



Organization development for Estonian schools

Training for school board trainers

Contacting & contracting

2.09

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Targets in Contacting

For client

- Get a picture of the consultant
- Submit goals
- Present the organisation and yourself
- Learn how it could work

For consultants

- Get a picture of the organization
- Show competence
- Getting to know partners
- Communicate concepts / procedures



© Trigon Entwicklungsberatung



In conversation:

- Align expectations
- Work out the target perspective
- Create a rough procedure sketch
- Is there any final competence to sign a contract?
- General conditions / administration
- Arrange first steps



© Trigon Entwicklungsberatung



Diagnosis

Client

- View on own problems – new perspectives
- How professional is a consultant?

Consultant

- What is the reason for the request?
- How does client see problems?
- Focal points and differences in perception
- Resilience of the client



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Future

Client

- What we want to achieve
- What are the values / goals of the consultant
- Which time span

Consultant

- What values does the client have
- What are fears / hopes



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Psychosocial processes

- Build confidence
- Shape roles and relationships
- Scan of power, security, autonomy



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Learning process

Client

- What do we learn from past experience?
- Profit from the experience of the consultants

Consultant

- Which learning styles live in the client system?
- Which language is typical for client



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Information process

Client

- Who do we need to inform about consultants
- What else do we want to know about consultants

Consultant

- What other information must the client provide
- What does the client need to know about me



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Implementation process

Client

- What should consultants do?
- With whom should interviews take place?
- Preparing formal decisions
- Making concrete agreements

Consultant

- What do I want to offer?
- Clear the place
- Estimate effort and time
- Calculation



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Process control

- Let us plan further contact meetings
- Decision on start-up activities
- Provide people, time, money



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Criteria of a good contract

Good contract

1. strong support from a person who also has the power to enter into a contract
2. high commitment of this person
3. support by internal consultants
4. financing is clear
5. deadlines have been agreed; it is clear who will participate in the project
6. objectives are clear
7. clients and consultants have a good feeling about working together
8. fears are openly expressed
9. possible risks are known
10. the next step has a diagnostic character, or is based on a previous diagnosis

Weak contract

1. the consultant has a bad feeling - without knowing why
2. the willingness of the client to invest time is unclear
3. many other things in the organisation are more important
4. insufficient planning time before the next action
5. unclear relationship between internal and external consultants
6. the client shifts all responsibility to the consultant

(according to Marvin Weisbord)



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Role of a consultant

2.10

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Everyone experiences,
that the way other people see him,
winged or paralyzed.
How I understand or misunderstand someone,
acknowledge or disregard,
has lasting effects on his self-experience and
his actual standing in the world.

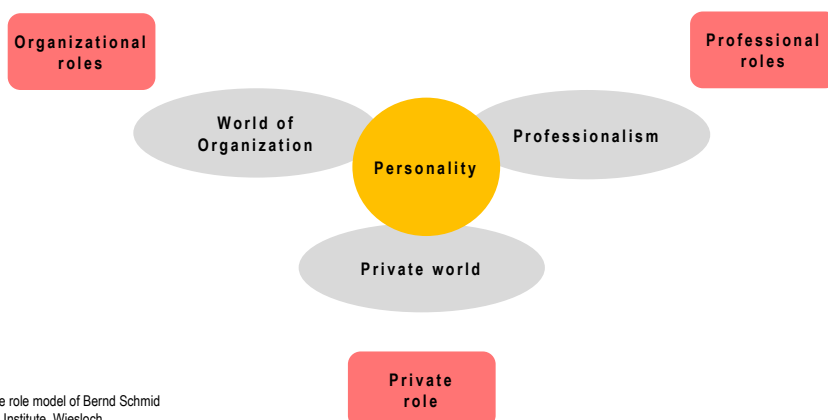
Bodo of Plato



© Trigon Entwicklungsberatung



Three-world model of personality in relation to a role-function model



The role model of Bernd Schmid
isb Institute, Wiesloch



© Trigon Entwicklungsberatung



Roles

- In private and professional life people take on different roles
- Role is experienced coherently when the behaviour is congruent
- Mostly unconscious
- A role can hinder you being completely authentic
- It is often necessary to take on different roles depending on the situation
- The environment of a person often cannot understand a situational role change
- Times of transformation require new role constellations from managers
- New roles and the appropriate behaviour can be learned
- Clarity of roles (with tasks, authorities and responsibilities) can determine the success or failure of actions
- The conscious clarification of roles is an essential intervention of organizational development



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The role contract

- **Role offer**
Every person is unique according to history, socialization, e.g. position in the succession of siblings, temperament, abilities, charisma, shape ...
- **Role requirements**
Role expectations of individual
- **Role contract**
Occurs when people meet a role expectation and assume the respective roles



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Developing a role

- **Feel, test**
A has a need for B's behaviour
B offers behaviour, A accepts behaviour from B
- **Confirm**
3 x repetition becomes the rule
Expectations are confirmed
Behavioural patterns are coordinated
- **Solidify**
Behavioural patterns often get executed unconsciously and repeat unreflectedly
Looping in ever further, danger of chronification



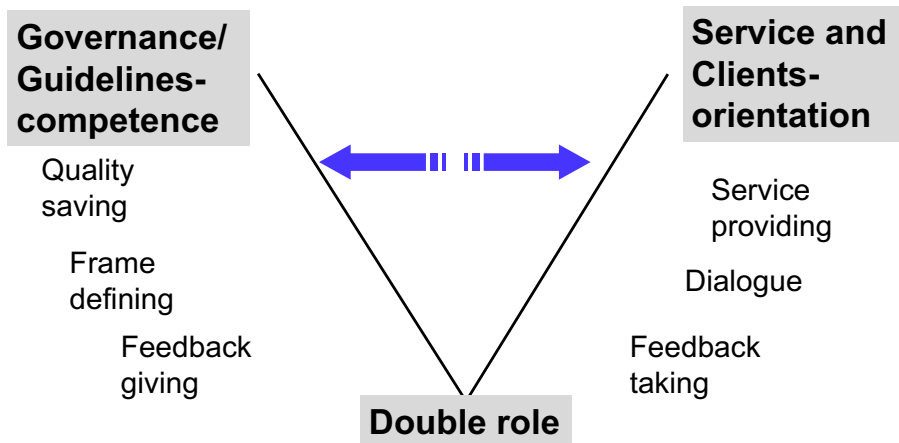
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Tension for internal consultants



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Guide in the sandwich position

Bravery

I express my thoughts and opinions and I fight for my conviction



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung

Wisdom

I express only what can be accepted by my contracting authorities



What defines a dominant role

Define room	Allocate space, make space, take space - grand gestures
Define time	Take the initiative, set the pace, set time frame
Define content	Define topic, specify terms
Communicate one-way	Act only as a transmitter, without aiming for consent, accept offers without consideration
Force something	Break resistance through sanctions, take advantage of the "thin spot" in the other person
Denial	Expected empathy, participation not fulfilled



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Expectations of a consultant



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Roles of a consultant

(see E. R. Schmidt, H. G. Berg. Consult with contact. Offenbach 1995)

Observer

- participates, makes observations available, formulates questions

Process facilitator

- observes, accompanies, comments, discusses interpretations, recommends

Sparring partner

- reflects, asks, gives feedback, shows chances and risks

Researcher

- analyzes, presents, organizes evaluation processes, is working on the conclusions

Problem solver

- examines solutions, evaluates them, suggests possible actions, structures decision-making processes

Coach

- supports, trains, prepares for critical situations

Expert

- evaluates, prepares expert opinions, formulates decision documents

Advocate

- advertises a certain idea, tries to influence



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Clarify and agree on consultant roles

For the following aspects/themes/problem areas ...

... the consultant will assume the role:

...the client will have the part:

In particular, the consultant will do:

The client will do this accordingly:

But the consultant will not do:

The delimitation of competences:

The delimitation of competences:



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Designing a workshop

2.11

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Workshop
School
2.1.2020 from 9:00 to 18:00

with
Harald Jäckel



© Trigon Entwicklungsberatung



Organization development in Estonian schools

Workshop design 1. day

time	method	content / step	min.	who	goals
8:00					
	coffee break				
	lunch				
	coffee break				
18.00		Planned end of day			



© Trigon Entwicklungsberatung





My color... Short introduction round

- Who I am...
- What I bring...
- What's important to me...
- What I'm looking forward to here...



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Arrival

All nines...



- What have we already achieved in 2019?
- What "all nines" did we achieve?
- How did we score internally and externally?
- What did/does this mean for us and our teams?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Our way through the day

- Arrival
- Overview, goals, expectations, rules
- Diagnosis: Four fields
- Work on identified issues
- Feedback and conclusion



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Goals



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



My expectations of this workshop



What should happen in this workshop?

What should the process be?

What should be the result?



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Rules in a learning team (suggestion)

- Perceive - instead of attribute something to somebody
Get to know contents
- Mistakes are part of learning! There are no "stupid" questions!
- No justification
- Talk about yourself- not about somebody – Please use „I“-messages
- Listen and let talk out – only the moderator is allowed to interrupt
- Please signal troubles
- Everyone has active part of responsibility!
- Our lived social culture sets an example
- Personal matters need confidentiality protection



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Our open issues

Diagram illustrating the relationship between short-term and long-term issues, categorized by indisputable and controversial status.

Indisputable (Top):

- Short term (Left):** 1. 2. 3. 4. 5.
- Long term (Right):** 1. 2. 3. 4. 5.

Controversial (Bottom):

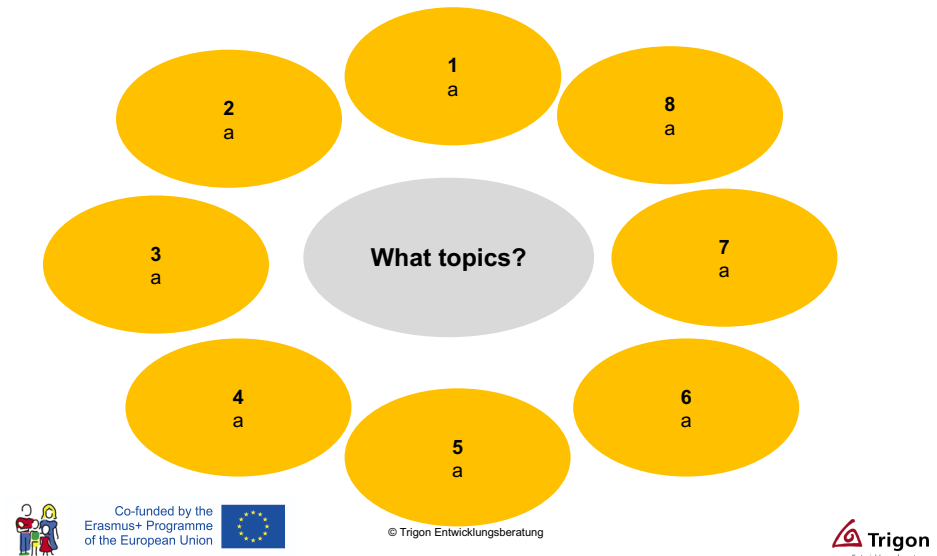
- Short term (Left):** 1. 2. 3. 4. 5.
- Long term (Right):** 1. 2. 3. 4. 5.

Co-funded by the Erasmus+ Programme of the European Union

© Trigon Entwicklungsberatung

Trigon Entwicklungsberatung

Fields of action



Preparation of topics in small groups	35 min
1 Subject What exactly is the question?	5
2 Brief diagnosis (strengths and weaknesses of the initial situation)	5
3 Next steps that seem to make sense - constructive or alternative	5
4 Required resources, means, capacities	5
5 Possible timetable as a forecast	5
6 Necessary decisions	5
7 Emotional resonance	5
0 - 100 Positive energy, motivation, hope, faith, spirit of optimism	
0-100 Negative energy, inhibition, doubt, worry, fear...	

Co-funded by the Erasmus+ Programme of the European Union

© Trigon Entwicklungsberatung

Trigon Entwicklungsberatung

Action

What?	
Target?	
Responsible?	
With whom?	
Until when?	
Conditions	
Importance: 0 - 10	
Urgency: 0 - 10	

✓ = Assuming clear

To be discussed



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Review, feedback, conclusion



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Mentoring

2.12

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



The Mentor



- Before entering the Trojan War, Odysseus trusted his son Telemachos, his friend's mentor, to educate him...
- A mentor is a person with life experience, who takes care of and encourages younger people, who are growing into responsibility.
- For decades, mentoring has been a conscious method of supporting and supervising junior staff.
- In organisations, mentoring serves to promote young talents in their personal and professional development.
- The aim is to pass on experience and knowledge and to build up networks



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Coaching and Mentoring

coaching

- Continuous and time-limited
- Partnership-based expiring
- Accompaniment and support
- For individuals, groups or teams
- In connection with professional role/task and the psychosocial aspects of the person (group)
- Goal-oriented and situation-oriented
- The coaching client himself is responsible for learning and making decisions

mentoring

- Temporally open, longer-term
- Demanding and promoting
- Accompaniment and development process
- For junior staff
- For targeted preparation of new tasks
- Under the guidance of an experienced person
- As a professional friend, supporter and helper
- Where the mentee himself is responsible for learning and developing



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Advantages and benefits of mentoring for the mentee/talent

- Professional and personal suggestions from an experienced person
- Insight into the formal and informal rules of the game of the organisation
- Concrete and field-tested recommendations
- Access to network contacts within the organization
- Familiar contact person for problems and critical situations
- Personal counsellor who promotes personal development



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Advantages and benefits of mentoring for the company

- Talents are promoted effectively and at an early stage
- Tried and tested practical knowledge and many years of experience are specifically passed on to junior staff
 - Support in goal, work and relationship issues
 - System oriented, taking into account the environment, practice-oriented
 - Holistically including factual, relational and value level
 - organisational expertise
- The learning culture of the organisation is promoted in a targeted manner
- Managers receive impulses and ideas from junior staff (reverse mentoring)
- Promotion of the competencies and potentials of managers and employees



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



...also the mentors benefit

- Expansion of the personal network within the company
- Reflection on one's own leadership behaviour
- Gain in consulting and accompanying experience
- Information from other organizational areas
- Insight into the leadership behaviour of new colleagues
- Acquisition of potential cooperation partners from other organizational areas



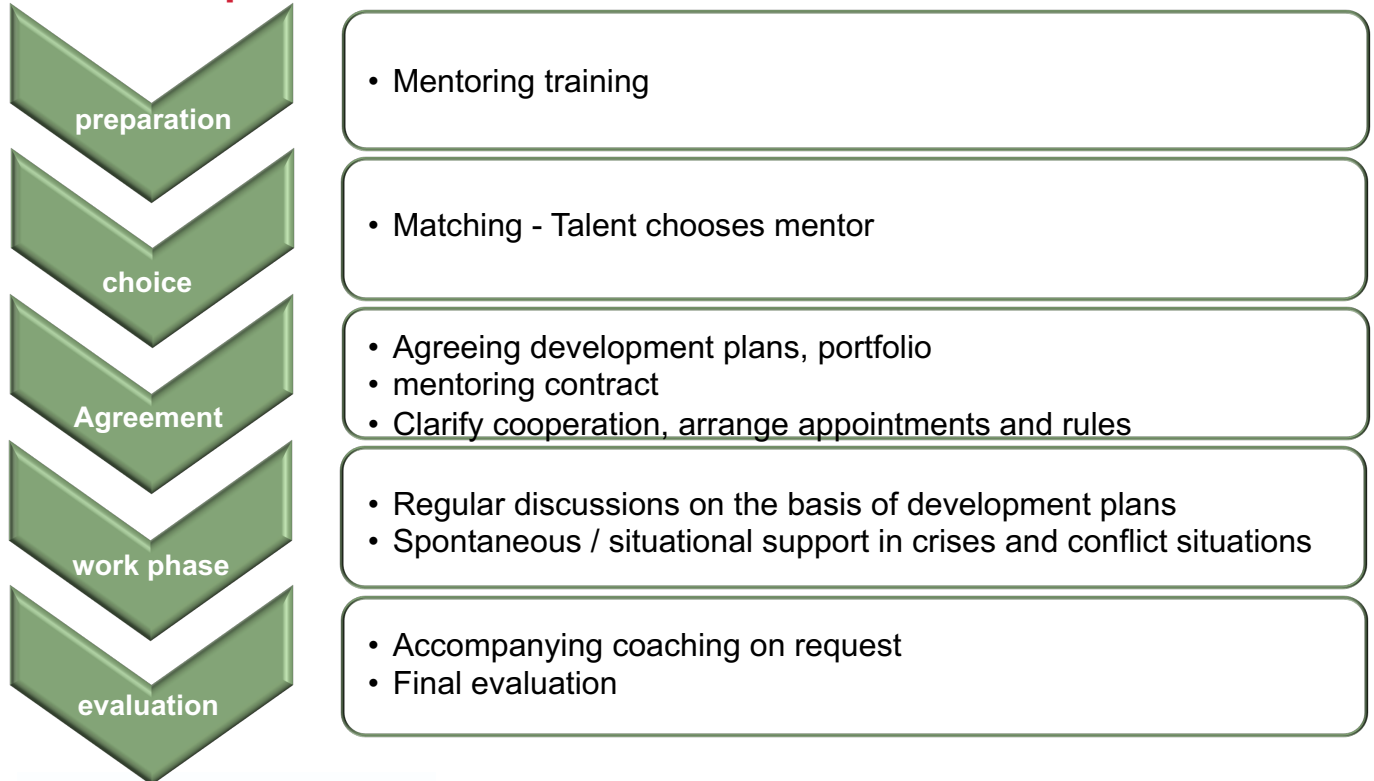
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Phase sequence



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Prerequisites

- Sufficient time budget
- Mentor and talent should not be within one area, one department
- Mentor must not be a superior
- Mentor should have sufficient experience (at least 3 years) and an appropriate contact network



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Qualifications

- Knowledge of the organization
 - Goals, Values
 - leadership culture
 - formal and informal rules of the game
- Ability to self-reflect and guide others to do so
- Knowledge of the mentoring methodology
- Strong communication skills
- High willingness to engage in conflict
- Ability to change perspectives
- Willingness to engage in talent



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



What does a good mentor do? (Results of a survey)

- Acts as a "sounding board", gives feedback on development
- Advisor, sponsor, mediator, confidant person
- Benevolent professional friend, always responsive
- "Controller" for agreed targets, possibly target giver
- Shows "railing" and helps mentee to move along it
- Analyser, clarifier of strengths and weaknesses, "development aid".
- role model, sage, room encoder, no "know-it-all"
- Career (under)supporters
- Recognised personality in the organisation
- Focus, challenge, trust and allow
- Self reflected, centered
- Active listener, problem solver, informant



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Mentoring contract

What to arrange between mentor and mentee

- The objective is the professional and personal advancement of the other
- The following applies for the duration of the mentoring relationship
 - What is spoken and written down is confidential
 - Both try to shape the mentoring relationship pro-actively
 - Emerging problems are addressed and a solution is worked out together
 - Both give open and clear feedback
 - Both assume responsibility for the mentoring relationship
 - The mentee is responsible for the preparation and follow-up of the joint meetings
 - The mentor takes minutes after each meeting
 - The mentee documents the progressive learning and development process (portfolio)
 - The mentor is responsible for imparting relevant knowledge and controlling the process
 - Mentoring is a voluntary and personal agreement and can be terminated unilaterally by either party at any time. This must be done in writing




Co-funded by the
Erasmus+ Programme
of the European Union




© Trigon Entwicklungsberatung




Mentoring contract	Differentiated agreements
Addresses and contact details	
Times of availability	
Number and rhythm of meetings	
Desired duration	
Mentee's expectations of the mentor	
Mentor's expectations of the mentee	
General conditions of the meetings	
When and how can the relationship end?	
Focus on the following topics at the beginning	
Further agreements	
Date, Signatures	



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Reflection on mentoring

- **What inspired me? What questions do I have ?**
- group discussion
- Core messages please on cards
- Subsequent plenary



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Requirements profile for consultants

2.13

Trigon Entwicklungsberatung und
Konfliktmanagement GmbH

Luisenstraße 1, D-80333 Munich, Germany
T: +49/89/24 20 89 90, www.trigon.de

Friedrich Glasl

Requirement profile of an OD consultant

In professional OD projects it is always about the situational correct linking of interventions from the **7 basic OE processes** (according to F. Glasl 1983) with the **7 elements of an organisation** (F. Glasl / B. Lievegoed 1993).

As a consultant, you protect yourself and your clients from problems if you honestly check yourself:

- How much competence do you already have in the following areas?
- In which area this competence needs to be expanded, deepened or supplemented by partners?

1. A) Check your competence for the OD basic processes according to the following gradations of the scores 5 to 1:

- 5 *I have mastered many methods, can communicate them to others well*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know few methods, need supplementation by consultants*
- 0 *I am not competent in it at all*

Note your score

(5 to 1) before each line of the following 7 OD basic processes:

**1. Diagnostic processes:
Methods, instruments,
skills, especially for ...**

- 5 *I know many methods, can communicate them well to others*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know only a few methods, I need additional counsellors*
- 0 *I'm not competent at all in this.*

1.1 Self-diagnosis (active participation of the persons concerned in the survey, questioning, observation)	5	4	3	2	1	0
1.2 Data feedback, data feedback to respondents	5	4	3	2	1	0
1.3 Design and moderation of diagnostic workshops, diagnostic retreats	5	4	3	2	1	0
1.4 Oral interview methods (individual interviews, group interviews ...)	5	4	3	2	1	0
1.5 Creation of written questionnaires	5	4	3	2	1	0
1.6 Designing sample surveys	5	4	3	2	1	0
1.7 Preparation, implementation and evaluation of written surveys	5	4	3	2	1	0
1.8 Metaphorical and imaginative diagnostic methods	5	4	3	2	1	0

Sum of the scores Diagnostic processes: _____

**2. Future design processes:
Methods, instruments,
skills, especially for:**

- 5 *I know many methods, can communicate them well to others*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know only a few methods, I need additional counsellors*
- 0 *I'm not competent at all in this.*

2.1 Joint formulation of direction statements for changes	5	4	3	2	1	0
2.2 The development of long-term visions, mission statements and concepts	5	4	3	2	1	0
2.3 Planning and implementation of future workshops and conferences	5	4	3	2	1	0
2.4 The development of milestones and strategic change goals	5	4	3	2	1	0
2.5 The formulation of measurable, operational change targets	5	4	3	2	1	0
2.6 The revision of services offered to customers	5	4	3	2	1	0
2.7 Scenarios for future organizational models	5	4	3	2	1	0
2.8 Artistic and imaginative methods for future designs	5	4	3	2	1	0

Sum of the scores of the future design processes:

3. Psychosocial change processes: Methods, instruments, skills, etc. for	<i>5 I know many methods, can communicate them well to others</i>					
	<i>4 I know many methods, can work with them independently</i>					
	<i>3 I know several methods, can use them quite well</i>					
	<i>2 I know some methods, need support</i>					
	<i>1 I know only a few methods, I need additional counsellors</i>					
	<i>0 I'm not competent at all in this.</i>					
3.1 Pointing out and treatment of taboo topics and power plays	5	4	3	2	1	0
3.2 Processing of disturbances, stresses and energy lows in processes	5	4	3	2	1	0
3.3 Picking up of signals of resistance and demotivation	5	4	3	2	1	0
3.4 Addressing and dealing with conflicts between persons, groups and organizational units	5	4	3	2	1	0
3.5 Uncovering and processing of conflicting interests	5	4	3	2	1	0
3.6 Dissolving unwritten role contracts and helping to find new roles and relationships	5	4	3	2	1	0
3.7 Editing of dominance and displacement behaviour in groups	5	4	3	2	1	0
3.8 Identifying and editing gender-specific role and behaviour patterns	5	4	3	2	1	0

Sum of the scores of psychosocial change processes:

4. Learning processes in the narrower sense: methods, instruments, skills, etc. for

- 5 *I know many methods, can communicate them well to others*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know only a few methods, I need additional counsellors*
- 0 *I'm not competent at all in this.*

4.1 Inputs to present more complex concepts and theories	5	4	3	2	1	0
4.2 Situatively improvised ad hoc inputs on organizational and cooperation issues	5	4	3	2	1	0
4.3 Small ad-hoc training sessions (skills training) on organizational and cooperation issues	5	4	3	2	1	0
4.4 Setting up of pilot projects in organizations	5	4	3	2	1	0
4.5 Setting up of ad hoc role-playing games to try out alternative courses of action	5	4	3	2	1	0
4.6 Insertion of small loosening and relaxation exercises when the process is too heady	5	4	3	2	1	0
4.7 Inclusion of creative and artistic forms of learning to deepen cognitive content	5	4	3	2	1	0
4.8 Applying the experience of emphasized learning methods	5	4	3	2	1	0

Sum of the scores learning processes: _____

5. Information processes: Methods, instruments, skills, especially for ...

- 5 *I know many methods, can communicate them well to others*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know only a few methods, I need additional counsellors*
- 0 *I'm not competent at all in this.*

5.1 Designing and moderating information markets	5	4	3	2	1	0
5.2 Organizing and holding major information events	5	4	3	2	1	0
5.3 Planning and moderating interactive information events	5	4	3	2	1	0
5.4 Dissemination of information by written means	5	4	3	2	1	0
5.5 Creating readable reports	5	4	3	2	1	0
5.6 Appealing design of visual communication media	5	4	3	2	1	0
5.7 Use of modern information and communication media (e-mail, internet, etc.)	5	4	3	2	1	0
5.8 Experience emphasised forms of communication	5	4	3	2	1	0

Sum of the scores information processes: _____

6. Implementation processes: Methods, instruments, skills in particular for

- 5 *I know many methods, can communicate them well to others*
- 4 *I know many methods, can work with them independently*
- 3 *I know several methods, can use them quite well*
- 2 *I know some methods, need support*
- 1 *I know only a few methods, I need additional counsellors*
- 0 *I'm not competent at all in this.*

6.1 Finding of motivating, symbolic actions by managers	5	4	3	2	1	0
6.2 Coaching of a manager for convincing exemplary behaviour of the manager	5	4	3	2	1	0
6.3 Creating a high level of commitment to objectives, plans, decisions	5	4	3	2	1	0
6.4 Decision methods for the selection and prioritisation of implementation projects	5	4	3	2	1	0
6.5 Providing projects with material and human resources	5	4	3	2	1	0
6.6 Assessing the need for secretarial support for projects	5	4	3	2	1	0
6.7 Step-by-step implementation of complex change projects	5	4	3	2	1	0
6.8 Identifying and removing obstacles to implementation	5	4	3	2	1	0

Sum of the scores Implementation processes: __

7. Management of change processes: Methods, instruments, skills, especially for	<i>5 I know many methods, can communicate them well to others</i>					
	<i>4 I know many methods, can work with them independently</i>					
	<i>3 I know several methods, can use them quite well</i>					
	<i>2 I know some methods, need support</i>					
	<i>1 I know only a few methods, I need additional counsellors</i>					
	<i>0 I'm not competent at all in this.</i>					
7.1 Designing medium-term, more complex change strategies	5	4	3	2	1	0
7.2 Design of workshops and retreats	5	4	3	2	1	0
7.3 Planning and facilitating decision-making processes for change projects	5	4	3	2	1	0
7.4 Appointing, coordinating and monitoring project teams	5	4	3	2	1	0
7.5 Establishment and staffing of steering groups, project teams, decision-maker groups	5	4	3	2	1	0
7.6 Organizing sponsors (promoters, godparents, mentors) for pilot projects	5	4	3	2	1	0
7.7 Review and evaluation of the results achieved	5	4	3	2	1	0
7.8 Coordinating change projects with ongoing business activities	5	4	3	2	1	0

Sum of the scores Management of the change processes:

2. B. Next, check what knowledge (concepts, models, theory) and skills (applicable techniques, practical skills) you have in relation to the 7 essential elements of an organization:

Score again self-critically from 5 to 1:

5 "I bring a lot with me and I can help others."

4 "I bring a lot with me and can work with it completely independently"

3 "I can generally work independently here."

2 "I bring in little knowledge and skill."

1 "I absolutely need competent experts to complement"

0 "I'm not competent here"

1. Identity of an area:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Image internally and externally, mission, vision and mission statement, basic values of a division, core services and core tasks of a division, grown self-image of a division, identification of employees with their division, cultural type of the division

Score:

5 4 3 2 1 0

2. Policy, guiding principles, strategies of an area:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Unwritten, "secret rules of the game" of a division or an overall organization, guiding principles for leadership, cooperation, customer orientation, etc., medium-term business strategy of a division, guiding principles for customer orientation, quality standards, etc.

Score:

5 4 3 2 1 0

3. Organizational structure

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Models for management structures (type and number of management levels), management span, criteria for central and decentral organizational units, knowledge of modern matrix forms, centers of competence, profit centers, etc.

Score:

5 4 3 2 1 0

4. People, groups, leadership, climate:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Images of man, development phases of human development, motivation theories, models for leadership styles and leadership techniques, theories and concepts for team development, conflicts and power in organisations, working atmosphere, etc.

Score:

5 4 3 2 1 0

5. Individual functions, organs:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Models for the analysis and design of tasks, competencies and responsibilities; models for work sharing and coordination; criteria for humanistic job design, work structuring, creation of delegation and representation rules, mandate for project groups, steering bodies, etc.

Score:

5 4 3 2 1 0

6. Processes and procedures:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Models for core processes, support processes and management processes; critical review and redesign of business processes; design rules for decision-making processes, information processes; process cost models; design of interfaces between areas, etc.

Score:

5 4 3 2 1 0

7. Material resources:

- 5 *"I bring a lot with me and I can support others"*
- 4 *"I bring a lot with me and can work with it on my own."*
- 3 *"I can generally work independently here."*
- 2 *"I bring in only little knowledge and skill"*
- 1 *"I absolutely need competent experts to complement"*
- 0 *"I'm not competent here"*

Financial flows within the company; budgeting methods, controlling methods; knowledge of the hardware of a division, understanding of the importance of architecture and technical resources for the division's operations, etc.

Score:

5	4	3	2	1	0

Sources:

Glasl, F. (Ed.): (1983) Administrative reform through organisational development. Bern/Stuttgart 1

Glasl, F. / Lievegoed, B. (1993) Dynamic corporate development. Bern/Stuttgart

Organization development for Estonian schools

Training for school board trainers

2.14 Leadership

- leading myself
- and leading others -

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20
89 99
trigon.muenchen@trigon.de,
www.trigon.de



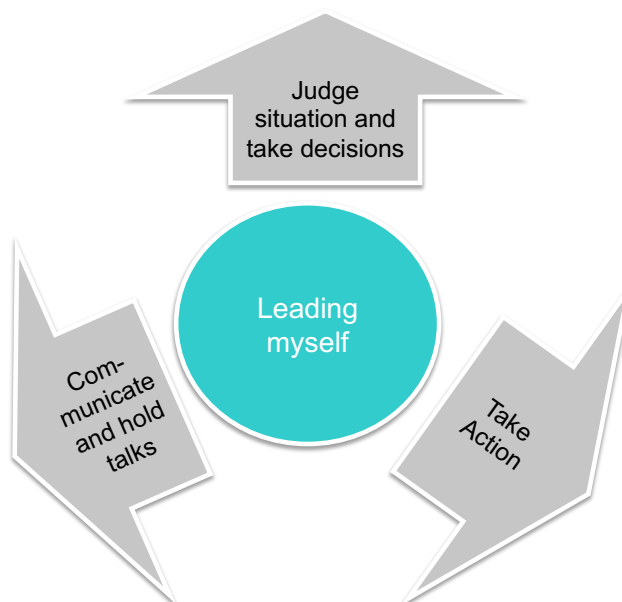
Introducing Thought

*„If your actions inspire others
to dream more, learn more, do more, and become more,
YOU ARE A LEADER.“*

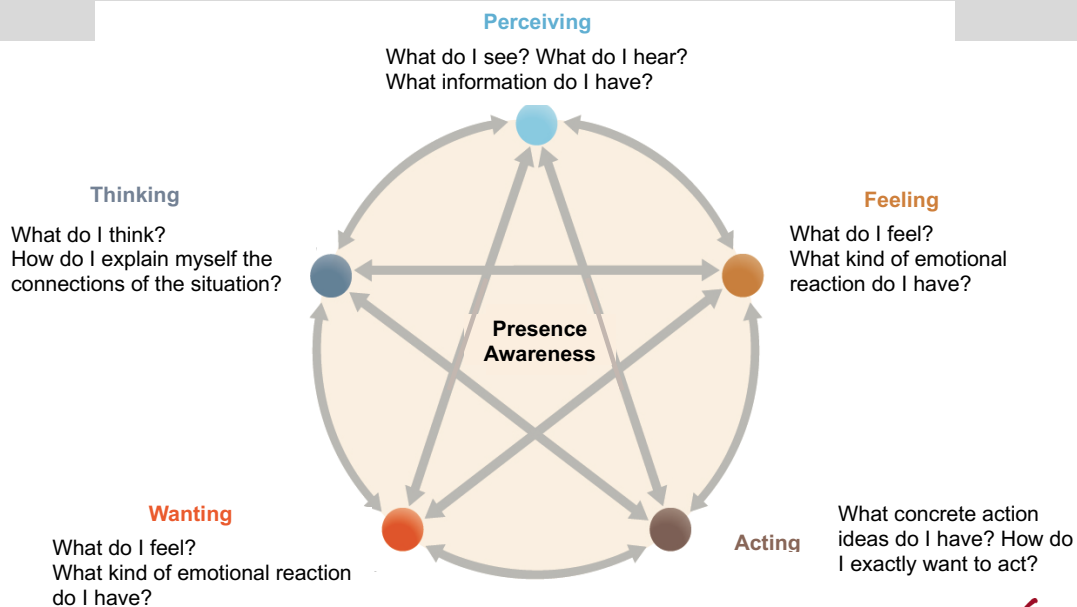
JOHN QUINCY ADAMS

Self-Leadership
- a part of excellent leadership -

Self-Leadership – Basic Activities of a Leader



Awareness for the Functions of Consciousness



© Trigon Entwicklungsberatung

5

Challenges of a Leader



© Trigon Entwicklungsberatung

6

Self-Reflection Awareness



Tasks of a leader

The Main Tasks of a Leader?



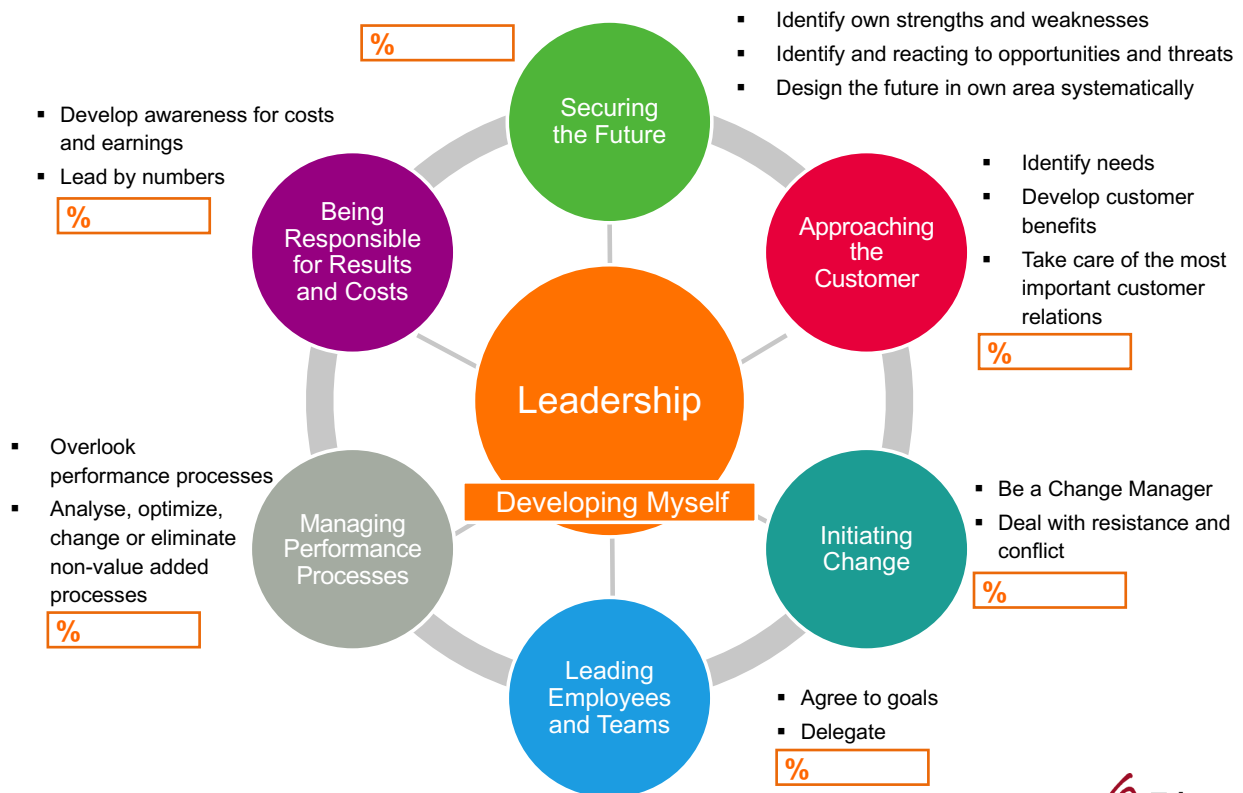
©Trigon Entwicklungsberatung

The Seven Main Tasks of a Leader



©Trigon Entwicklungsberatung

How much time do I spend on each of the seven core tasks of a leader?

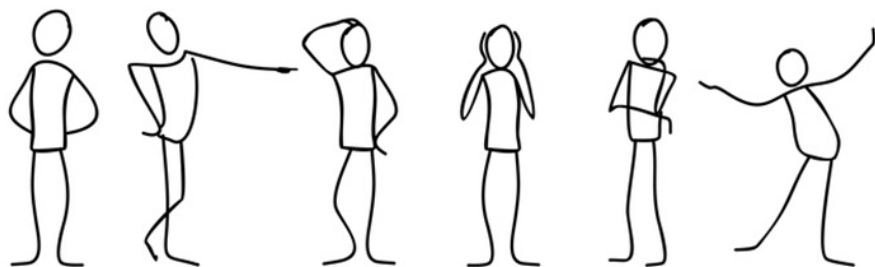


©Trigon Entwicklungsberatung

11

Trigon
Entwicklungsberatung

Typical Issues of Manager and Subordinate



Typical Manager Issues Include:

- Lack of patience
- Feeling of being held back
- Feeling of not being given the opportunity to use their full potential

Typical Subordinates Issues include:

- Lack of attention
- Inadequate development
- Feelings of inadequacy

©Trigon Entwicklungsberatung

12

Trigon
Entwicklungsberatung

Comparison between Strategic Leadership and Operational Management

STRATEGIC LEADERSHIP		OPERATIONAL MANAGEMENT	
Deciding	Doing	Deciding	Doing
<ul style="list-style-type: none"> ▪ long-term goals ▪ business fields ▪ products/services/technologies ▪ long-term marketing strategies ▪ capacity expansion ▪ investment budgets 	<ul style="list-style-type: none"> ▪ developing new technologies/processes ▪ product and service innovation ▪ capacity expansion ▪ developing new skills ▪ seeking new markets, developing, testing ▪ launching new products ▪ long-term staff development 	<ul style="list-style-type: none"> ▪ short-term goals ▪ production quantities ▪ production processes ▪ prices ▪ advertising campaigns ▪ operational budgets 	<ul style="list-style-type: none"> ▪ producing/promoting/selling ▪ purchasing/supplying ▪ service ▪ efficiency improvement, cost reductions ▪ performing quality circles ▪ cash management ▪ recruitment, salary and compensation

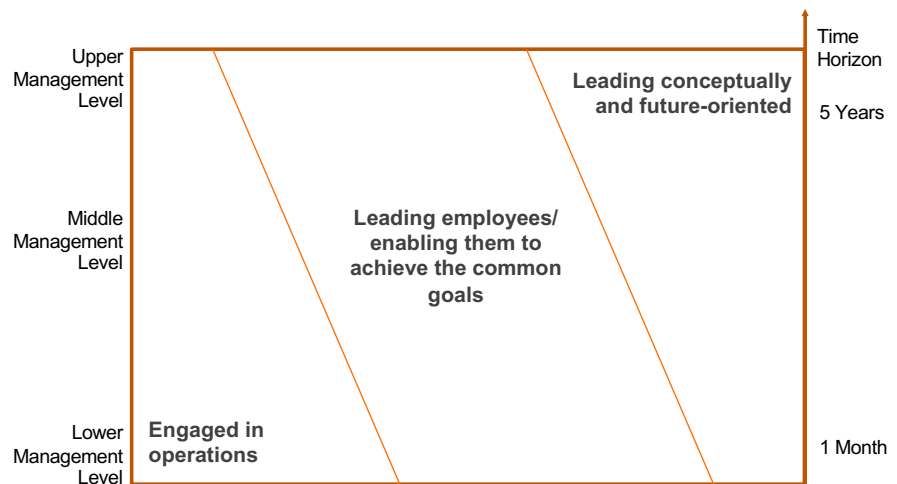
Comparison between Strategic Leadership and Operational Management

STRATEGIC LEADERSHIP		OPERATIONAL MANAGEMENT	
Deciding	Doing	Deciding	Doing
<ul style="list-style-type: none"> ▪ long-term goals ▪ business fields ▪ products/services/technologies ▪ long-term marketing strategies ▪ capacity expansion 	<ul style="list-style-type: none"> ▪ developing new technologies/processes ▪ product and service innovation ▪ capacity expansion ▪ developing new skills ▪ seeking new markets 	<ul style="list-style-type: none"> ▪ short-term goals ▪ production quantities ▪ production processes ▪ prices ▪ advertising campaigns ▪ operational budgets 	<ul style="list-style-type: none"> ▪ producing/promoting/selling ▪ purchasing/supplying ▪ service ▪ efficiency improvement, cost reductions ▪ performing quality circles
<p>The aim of strategic management: developing and maintaining potential for success</p> <p>„Doing the right thing“</p>		<p>The aim of operational management: achieving short-term success</p> <p>„Doing the things right“</p>	

Daily Business and Shaping the Future

The higher the manager is located in the "hierarchy", the stronger he/she should reduce the daily operations in favour of conceptual activities.

At the same time, the time horizon is growing for which the manager has to plan for.



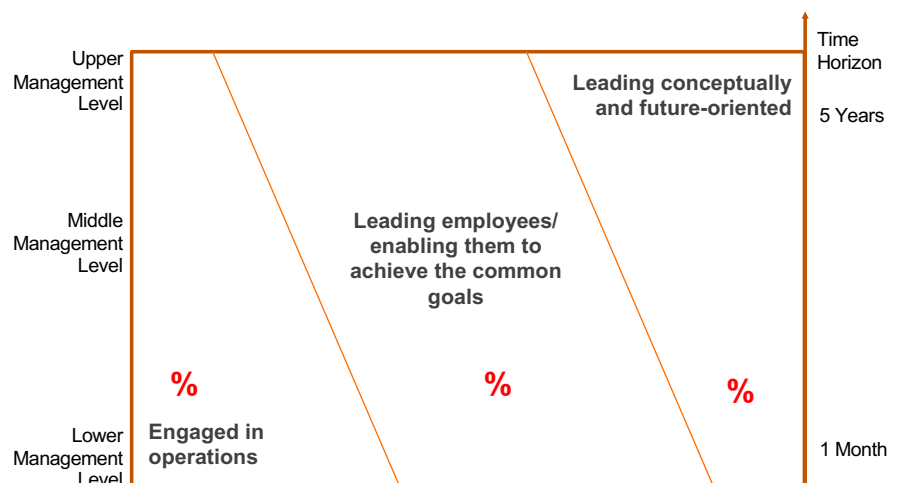
Self-Assessment

Consideration:

To what extent (%) are you engaged in these three fields?

Take a day/week/month as an example and allocate your activities into these fields.

What are you doing too much? What are you doing too little?



How do I develop the Future?

Recognizing changes and doing environmental scanning

- ...

Developing the unit's vision, strategic goals and mission

- ...

Defining strategic pathways and milestones and implementing the strategy

- ...

Systematically improving and developing the collaboration in the team/region

- ...

Continue developing the culture, that is, to work systematically on changing the values, attitudes and behaviour: customer- quality- and cost-orientation

- ...

Systematic human resource management, which is based on the strategic objectives

- ...

Promoting innovation: products, processes, cooperation

- ...

How to Implement Strategic Leadership into Daily Work?



- Never put strategic issues at the end of the meeting agenda – you will never have enough time to tackle them
- Hold meetings with the focus on strategic issues at least 2 times a year with your team
 - Keep it simple, make it specific
 - Debate assumptions, not forecasts
 - Discuss resource deployments early
 - Clearly identify priorities
 - Continuously monitor performance
- Integrate strategy and yearly planning circle
- Reward and develop execution capabilities
- Communicate, communicate, communicate (Important messages need to be sent 7 times to anchor)

What else can you do?

Organization development for Estonian schools

Training for school board trainers

2.15 Leadership concepts and leadership challenges in different stages of an organization

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20
89 99
trigon.muenchen@trigon.de,
www.trigon.de



Introducing Thought

*„If your actions inspire others
to dream more, learn more, do more, and become more,
YOU ARE A LEADER.“*

JOHN QUINCY ADAMS

Development of Leadership Concepts

- A Time Travel -

The Leadership Framework and its Elements: Philosophy, Style & Techniques (Friedrich Glasl)

Concept of Leadership/ Leadership-Model

Management Philosophy

- Cognitive aspect of a leadership model
- General attitude, basic assumptions about *human beings* and the world core values at work (e.g. Mc Gregors "theory X – theory Y" 1970, Human Relations Model 1969, ...)

Leadership Style

- Layout and design of relationship between those who lead and those who are led
 - the socio-emotional climate -
- Core attitudes and preferences for behavior of leaders (inner patterns)
- Degree of mutual influence and control
- (e.g. scaled model of 7 leadership styles by Tannenbaum/Schmidt: authoritarian paternalistic, counseling, cooperativ, participative, democratic)

Leading Techniques

- Concrete rules of exertion of leaders behavior,
- Tools and methods, that determine leaders behavior

Level of Involvement in Decision-Making

Use of Authority by the Leader

Team Members
Power and Influence

Leader
Power and Influence

Area of Involvement of Team Members

Authoritarian	Paternalistic	Consultative	Cooperative	Participative	Democratic
<ul style="list-style-type: none"> • Leader is able to take decisions which others accept • Takes decision and announces it 	<ul style="list-style-type: none"> • Leader „sells“ decision • Interested in gaining acceptance 	<ul style="list-style-type: none"> • Leader presents ideas and/or decision and invites to ask questions 	<ul style="list-style-type: none"> • Leader presents tentative decision subject to change after inputs 	<ul style="list-style-type: none"> • Leader presents the problem, gets suggestions and inputs, then decides 	<ul style="list-style-type: none"> • Leader defines limits within which group take decisions • Joint decision making within limits defined by organizational constraints

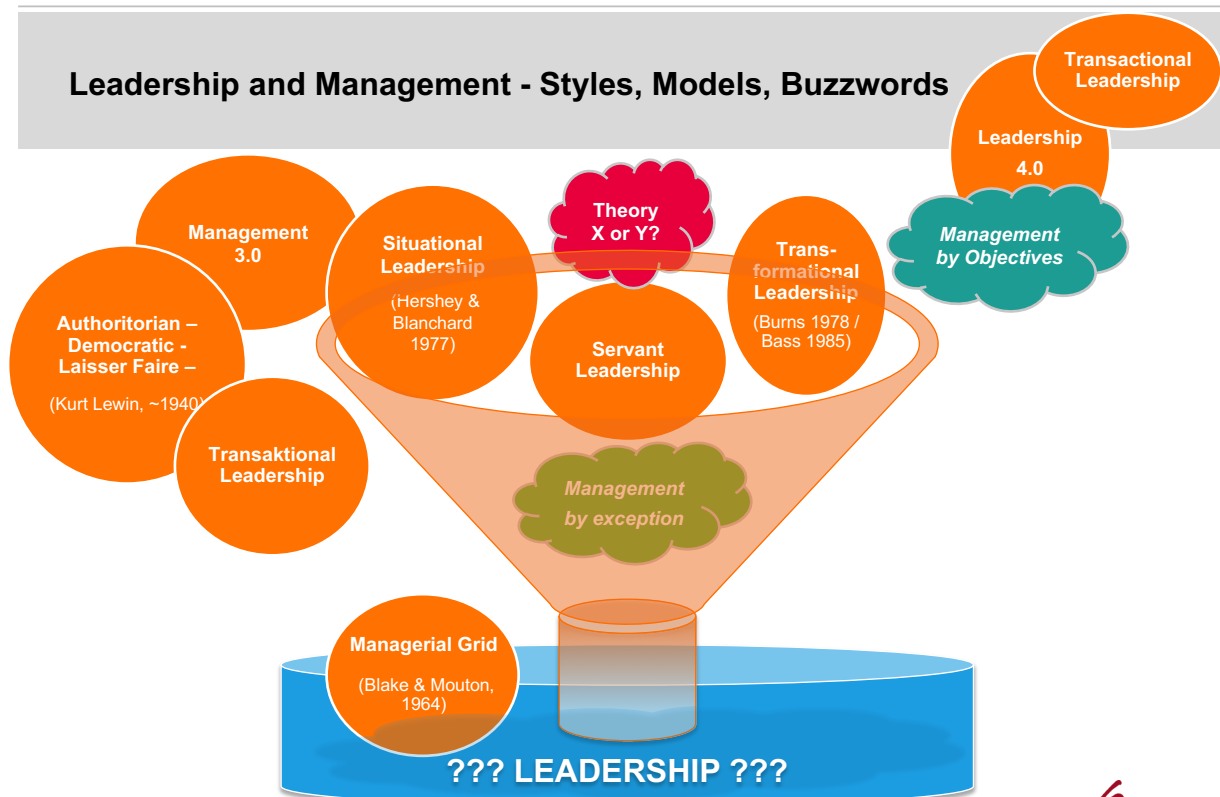
Source: Tannenbaum/Schmidt (1958): How to choose a leadership pattern, In: HBR March/April 1958, S. 95-101

©Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

5

Leadership and Management - Styles, Models, Buzzwords

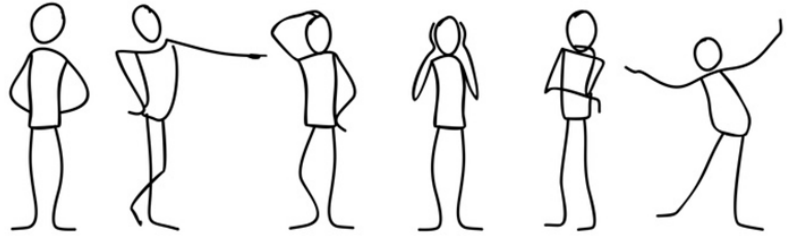


©Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

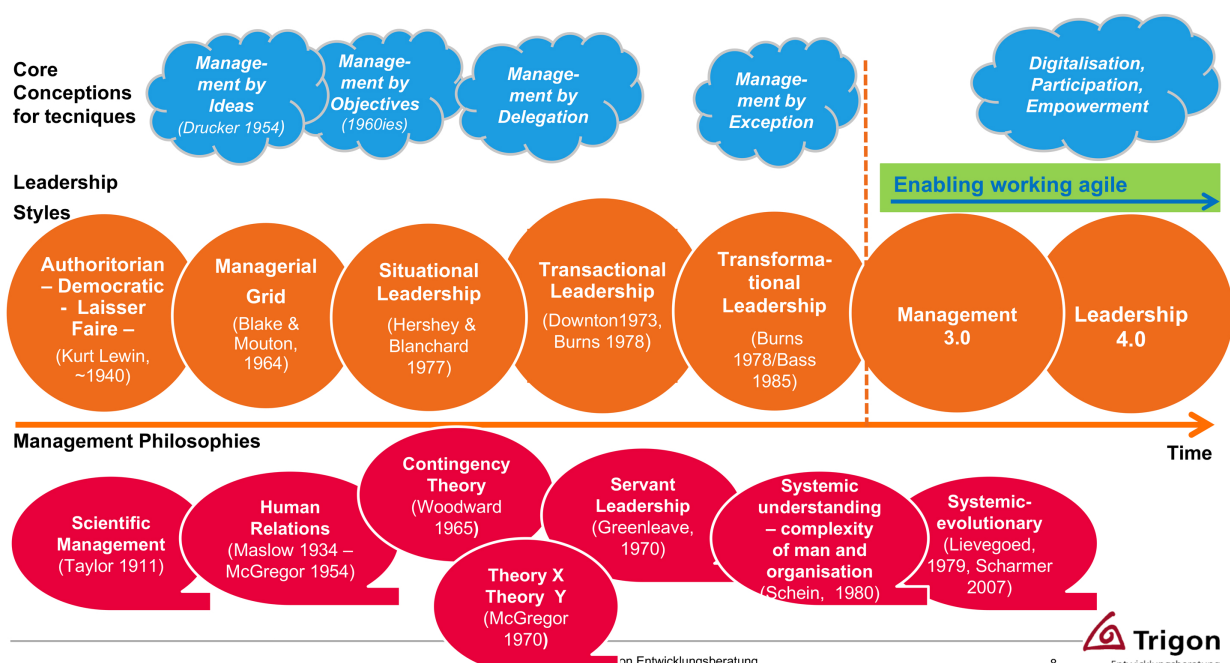
6

The individual Leadership Style

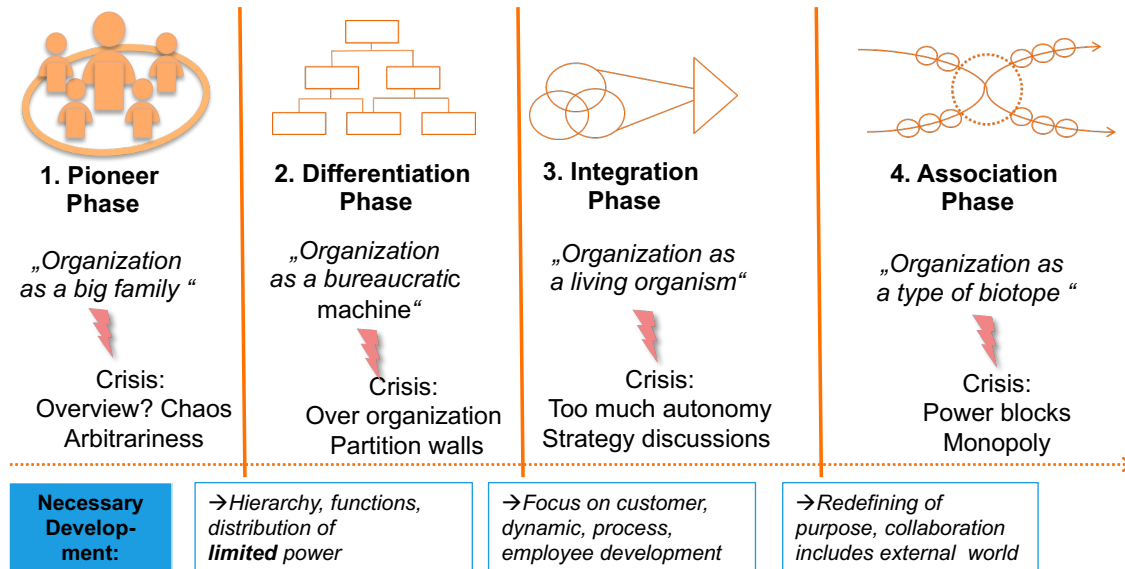


Self-reflection and Discussion	Personal Touch	Theory X	Theory Y
<ul style="list-style-type: none"> What do I think how employees are motivated? 	<ul style="list-style-type: none"> Leadership is influenced by a person's character, customs and beliefs. McGregor's theory X and Y calls for two conflicting beliefs how leaders can see their employees 	<ul style="list-style-type: none"> People are basically lazy and shy away from responsibility. Corporate goals can only be achieved through leadership, pressure and threat of punishment. 	<ul style="list-style-type: none"> People are motivated to work and the want to realize themselves. Initiative and willingness for self-improvement are possible when the right conditions are met.

Leadership and Management – A Fragmentary Timeline of Management Philosophies, Leadership Styles & Techniques



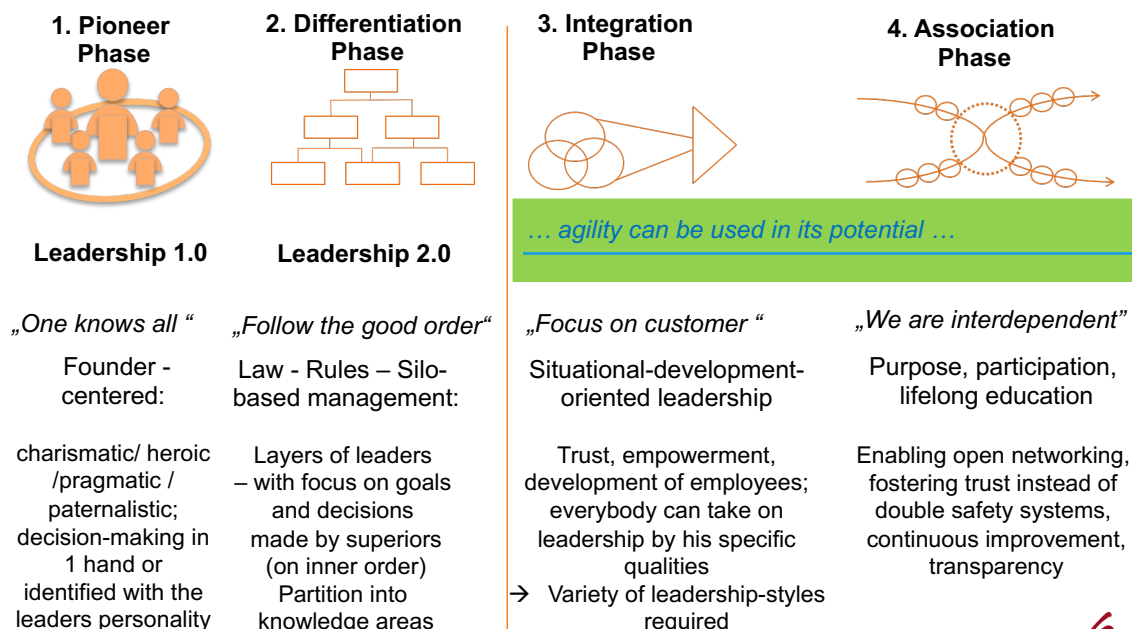
Context of Leadership and Management Models - Development Phases of Organizations - (Glasl/Lievegoed – 2004)



©Trigon Entwicklungsberatung

9  **Trigon**
Entwicklungsberatung

Leadership and Stage of the Organization



©Trigon Entwicklungsberatung

10  **Trigon**
Entwicklungsberatung

Leadership 4.0 – Within the Organization

- Leading in a VUCA-environment – embracing digitalisation –

(VUCA = Volatile, Uncertain, Complex, Ambiguous)

Leaders 4.0 leave behind:

- Leading mainly by Command & Control
- Decision-making only on their own
- Micro-Management /constant interfering in tasks
- Emphasizing their own power and high status
- Communication-lines following the organigramm
- Exclusive information policy and restricted sharing of knowledge



Post-heroic leadership

Leaders 4.0 are committed to:

- Participation & Self-Responsibility & Empowerment
- Leading within a network of other people in lead
- Remote Leadership – give up control
- Communication on eye-level
- Cohesion: approachable, in relation and contact, behave reliably/trustworthy, stand for a firm will to deal with conflict situations when needed
- Open information, open sharing of knowledge
- Using the full scope of digital possibilities for collaboration and agility

Leadership 4.0 – in Relationship with Customers and Competitors

Leaders 4.0 leave behind:

- EBITs / Revenues as the only focus for success
- Exclusive information policy and restricted sharing of knowledge
- Fight mode

Leaders 4.0 are committed to:

- „Purpose for the customer“ as main orientation + value-based entrepreneurship
- Open communication on eye-level with the customer
- Collaboration / Cooperation mode:
Be approachable, behave reliably/trustworthy, and as well stand for a firm will to deal with conflict if needed
- Co-creation and cooperation even with competitors - to realize innovation and improvement for the customer

Leaders 4.0 take on responsibility as a role model for all employees.

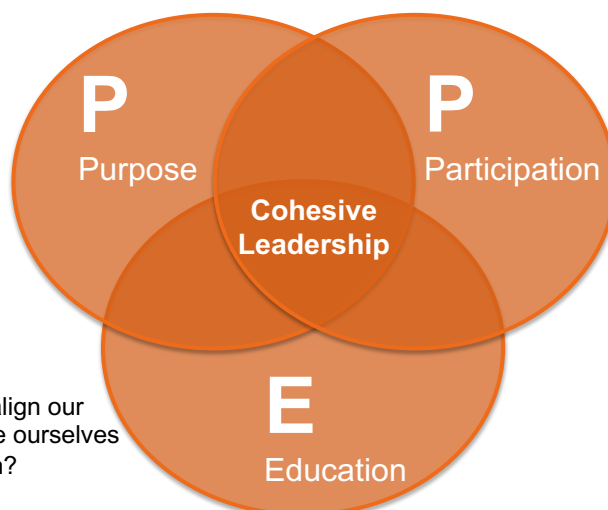
Cohesive Leadership

A Meta-Concept of Leadership

Meta Concept Cohesive Leadership

In a world of fast changing requirements, growing complexity and globally operating teams, it is a great challenge for organizations and its leaders to maintain a certain degree of cohesion. Cohesion is the basis for good collaboration, communication and goal achievement. For leaders this means that it is even more important to develop their humanistic personality and character than their professional competence for the digital world.

How does the world
get a little better
through our actions?



How can we involve
employees in the joint
progress?

How do we need to align our
trainings and educate ourselves
towards collaboration?

P for Purpose



Purpose focuses on:

- The common good
- Sustainability of actions and work outcomes
- Leading by example (Ethical role model).

To identify, create and handle **Purpose** well the following aspects are crucial:

- A great deal of empathy is needed in order to identify the needs for the environment and the people. (Customers, Employees, Stakeholders, Individuals of Society, etc.).
- As a leader it is crucial to be able to convey the purpose of the organisation and the work to all people involved in the work process.
- Intuition and authenticity as key competencies for good leaders.

E for Education



Education deals with:

- The right skill set (e.g. conflict management, communication, collaboration, etc).
- Social learning in groups. Through e.g. constructive conflict-resolution, new ways can be established and innovation can be fostered.
- Practical qualifications (e.g. Problem-solving, decision-making, constructive communication, conflict management, etc.).
- Permeability of departmental, hierarchical and corporate silos.

Continuation - E for Education



Education deals with:

- 21st Century Skills (Proposed by OECD & World Economic Forum):
 - ✓ **Understanding the world:** dealing with complexity, media competence and knowledge management.
 - ✓ **Mastering the world:** Social and intercultural action, willingness to change, personal responsibility.
 - ✓ **Creating something new together:** Communication, conflict management and innovation.

P for Participation



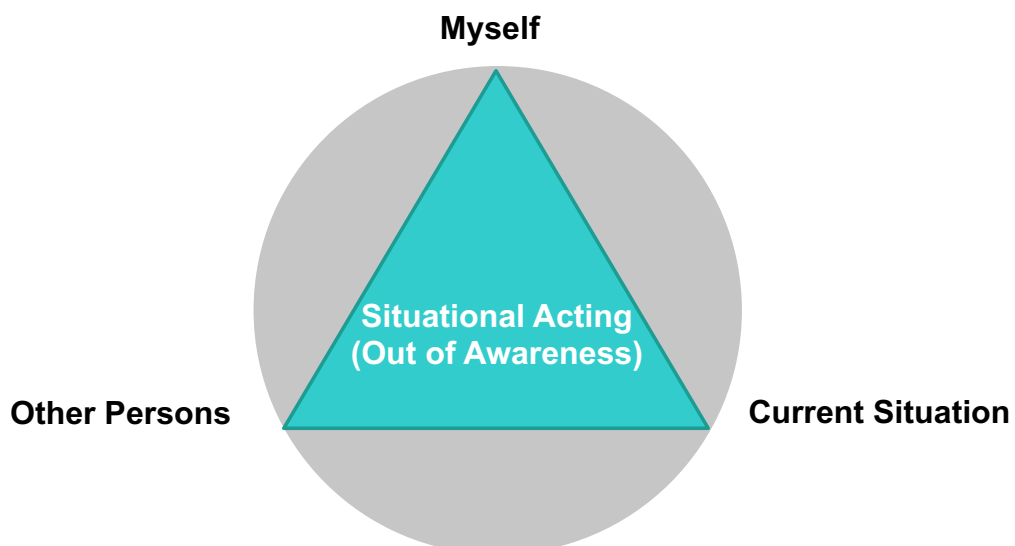
Participation aims at:

- The involvement of all people working together towards a common goal.
- Defining these goals together.
- Delegation (sharing work).
- Entrusting employees with responsibility.
- Fostering entrepreneurial thinking.

Situational and Development-oriented Leadership

©Trigon Entwicklungsberatung

Three Perspectives for the Situational Acting as a Leader



©Trigon Entwicklungsberatung

Recommendations for the Leader: Situational and Development-Oriented Leadership

When assigning a task to an employee or a project team member

- Recognize the needs of the situation
- Recognize the capabilities and motivation of employees
- And define appropriately the responsibilities and the scope of action

Thereby assisting the employee in his or her development

- How can I support him/her professionally? – Increase his/her skills and performance
- How can I support his emotional and motivational development? – Personal responsibility, commitment, initiative?

Create the right level of challenge

- If I understand the needs of the employee, I can create motivational challenges (stretch-zone) and avoid excessive demands and under challenging (stress-zone)

Situational acting as a (project)manager

- The leader should look renewed at every situation and change their own style of leadership according to the situation's demands: → Directing – Training – Supporting – Delegating

The Necessary Flexibility of Taking on Various Roles of the Leader

Assessment of the situation

- The assessment of an employee and of a management situation is also related to one's own beliefs: How are employees motivated? (s. slide 7: theory x – theory y)

The ordinary style of leadership

- Leadership style is strongly influenced by one's own character and habits. Knowledge of one self is important to assess one's own abilities and capabilities: What are my traits? What are my needs as a leader? What leadership style is easy for me? What leadership style is difficult for me?
 - Directing leadership style: directing, determined and clear language
 - Training leadership style: initiating learning and practice processes
 - Supporting leadership style: supporting, caring
 - Delegating leadership style: delegating full authority, letting go, trust

Role flexibility – situational change of leadership styles

- How do I manage situational leadership, switching from one style to another?
- What should I learn in order to meet the demands of different situations and people?
- What do I have to „unlearn“ in order to meet the different demands of situations and people?

Leadership-Styles

Newcomers and career changers:

- Seek guidance, still need to find their roles
- Need concrete assistance in the performance of work

I. Directing Leadership Style

Independent and autonomous working employees:

- Professional skills
- Good organization

IV. Delegating Leadership Style

Employees who need to professionalize:

- In the work processes
- In social behaviour

II. Training Leadership Style

Employees who are largely self-employed, need support in certain situations:

- Technical uncertainties
- With difficult decisions

III. Supporting Leadership Style

©Trigon Entwicklungsberatung

23

Trigon
Entwicklungsberatung

I. Directing Leadership Style



I. Directing Leadership Style

Situation of Employees

Factual Level:

- Ambiguity of the task
- Lack of experience
- Excessive demand
- Lack of involvement in the unit

Motivation Level:

- Need for security
- Need for orientation & guidance
- Need for support

Possible Management Steps:

- Discuss precisely the responsibilities, tasks and authorities
- Explain the usefulness of the tasks
- Provide information on obstacles
- Show exactly how it is to be done
- Check the intermediate steps
- Final inspection of the result

©Trigon Entwicklungsberatung

24

Trigon
Entwicklungsberatung

II. Training Leadership Style



II. Training Leadership Style

Situation of Employees

Factual Level:

- Partially sound competence, partially lacking competence
- Ambiguities in cooperation with others

Motivation Level:

- Need to take things into their own hands to show their own ability
- Need for participation
- Need to find his or her own place
- Need to develop further

Possible Management Steps:

- Clarify and agree on development objectives
- Discuss the specific approach
- Regular discussions and feedback

III. Supporting Leadership Style



III. Supporting Leadership Style

Situation of Employees

Factual Level:

- Work largely independent
- In difficult situations, professional and at times, emotional support is necessary

Motivation Level:

- Need for encouragement, confirmation
- Need for leeway

Possible Management Steps:

- Create spaces for freedom
- Provide support in difficult situations
- For the development of scenarios for alternative solutions
- For assessing risk
- For recognizing of teammates and opponents

IV. Delegating Leadership Style



IV. Delegating Leadership Style

Situation of Employees

Factual Level:

- Ambiguity of the task
- Lack of experience
- Excessive demand
- Lack of involvement in the unit

Motivation Level:

- Need for security
- Need for orientation
- Need for support

Possible Management Steps:

- Discuss precisely the responsibilities, tasks and authorities
- Explain the usefulness of the tasks
- Provide information on obstacles
- Check the intermediate steps
- Final inspection of the result

The Rules in our Organisation about Leadership

- What do you think are the official rules of leadership in your organisation?
- What do you think are the hidden rules of leadership in your organisation?

What is Employee Development?

Employee Development means to track and manage your team's competencies related to personal and organizational needs.

The goals are to ensure that your organization has the skills needed now and in the future.

Consistent employee development also helps to retain people.

It aims to provide a balance between individual career needs and goals and the organization's need to get the work done.

There are six main factors related to people development:

1. Understanding the needs of your organization and your team
2. Leadership Development
3. Training and Career development
4. Managing Knowledge
5. Coaching and Mentoring
6. Peer Consulting

Organization development for Estonian schools

Training for school board trainers

2.16 Decision making

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de

© Trigon Entwicklungsberatung



1. Decision-Making and Leadership:

© Trigon Entwicklungsberatung



• Decision-Making – a Core Task of Leadership I

To be able to and to **be in power** of decision-making is the **central function of leadership** in organisations.

Decision-making and power in the organisation are strongly connected in traditional organisations.

In times of a VUCA-environment it is necessary to rethink hierarchical procedures of decision making.

In a non-changing world it is very appropriate to decide along the status within an organisation.

In a VUCA-world as well quality and acceptance of a decision play a much more important role than before.

Quality consists of many parameters and has to be looked at from various perspectives. As well does acceptance.

If both criteria are met, a really effective decision has been taken.

Deciding and decision-making are challenging processes of leadership.

That is why it is valuable to understand very well:

- **the process of decision-making** and **deciding**
- **the differences in decision-making** depending on the environmental surroundings of a required decision

• Decision-Making – a Core Task of Leadership II

In complex contexts a leader should take on his leading role in awareness of the special challenges.

He will:

- **enable experiments:** try out new approaches („safe-to-fail“-projects, prototyping, ...)
- **make use of inconvenient experiences of failure to gain results for learning,** to enhance knowledge and experience (open and unthreatening evaluation of failures)
- **intensify interaction and communication:**
 - keep track on the goal and challenges the others (- instead of running ahead)
 - ask for dissent and gives space for development of new ideas and work on contradictions
 - keep high attention to sense even weak signals
 - therefore is in close contact with people, shows involvement and interest in the development
 - allow and facilitate conflict clarification
- **support and use creativity, diversity, difference**

2. The Cynefin-Framework

- A Meta-Model for Decision-Making -

© Trigon Entwicklungsberatung



- **A Meta-Model for Decision-Making:
The Cynefin-Framework**

Decisions and decision-making can have very different frames and contexts.

The **Cynefin-Model** differentiates between four different kind of problems and stades of context:

- **Simple**
- **Complicated**
- **Complex**
- **Chaotic**

In a VUCA-world the well-known strategies of simple and complicated contexts are not any more efficient.

Acting innovative and standing stable in crisis requires a deep understanding of decision-making under complex and chaotic circumstances, and a deep knowledge in what kind of participation fits under which circumstances.

The fifth field „**Disorder**“ is the area you are in, if you are not aware of whether you are working on a simple, complicated, complex or chaotic situation.

Then you should first sort out which aspects of your problem qualify for which area and start then working on it.

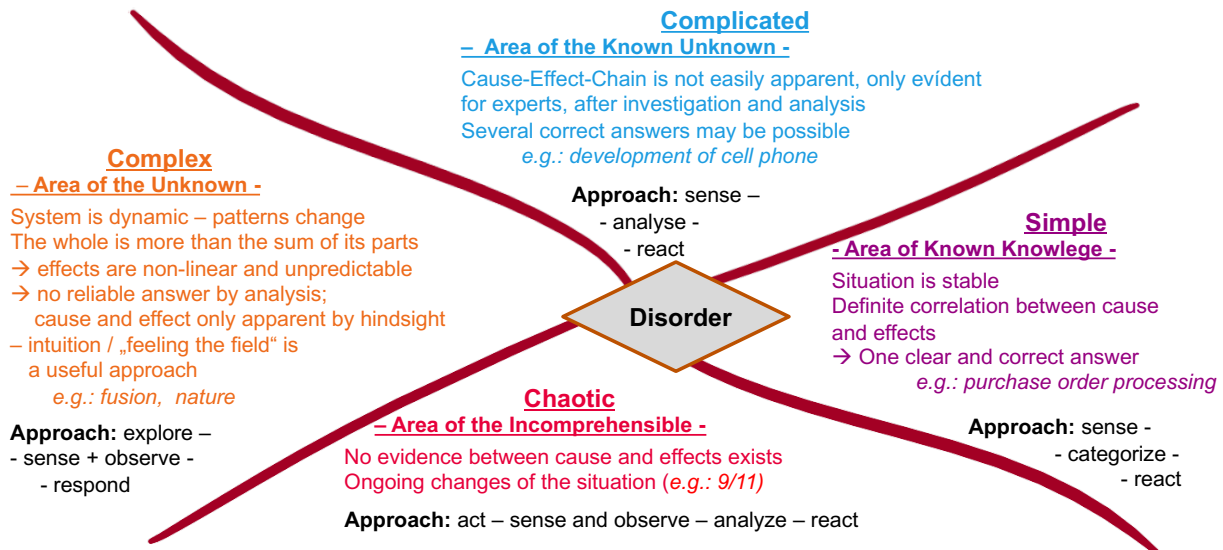
Based on: David Snowden/Mary Boone (2007): Das Cynefin-Framework

© Trigon Entwicklungsberatung

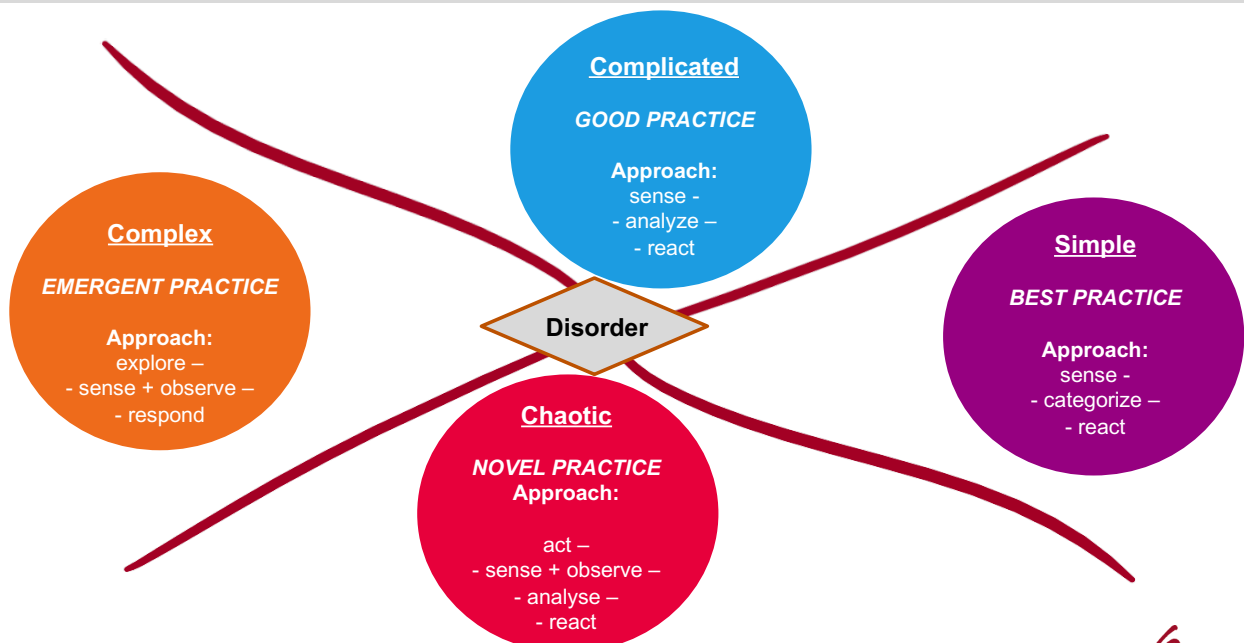
6



The different Fields of the Cynefin-Framework



The Cynefin-Framework – A Meta-Model for Decision-Making

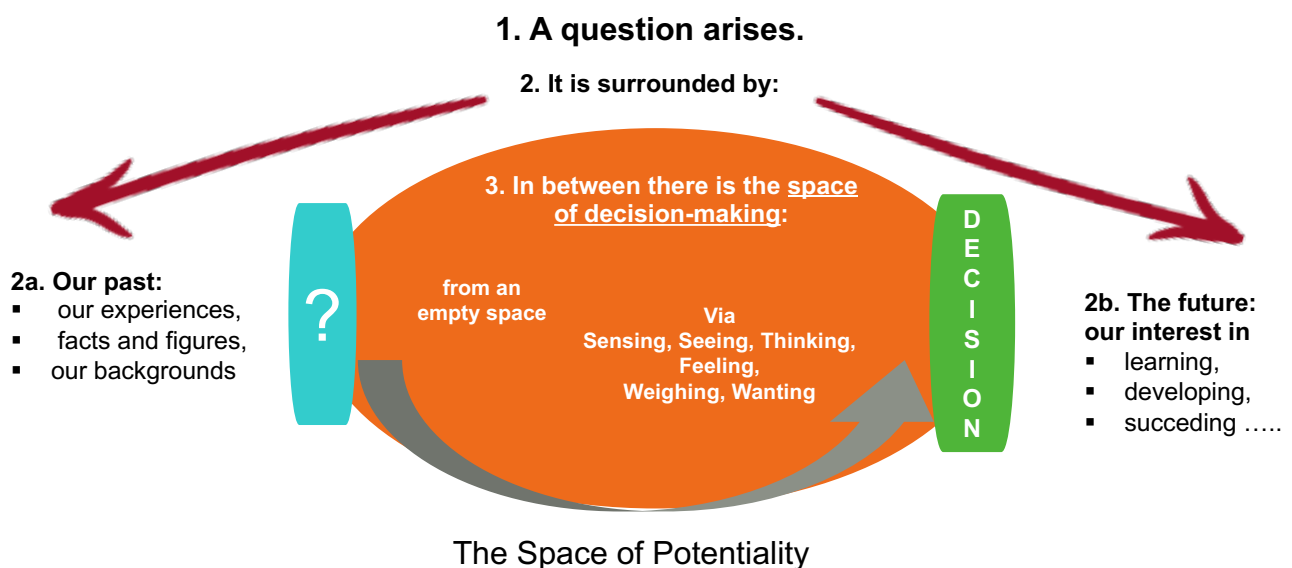


3. The Art of appropriate Decision-Making

© Trigon Entwicklungsberatung



The Process of Decision-Making and Deciding: It always starts through a Question, a Feeling of Discrepancy

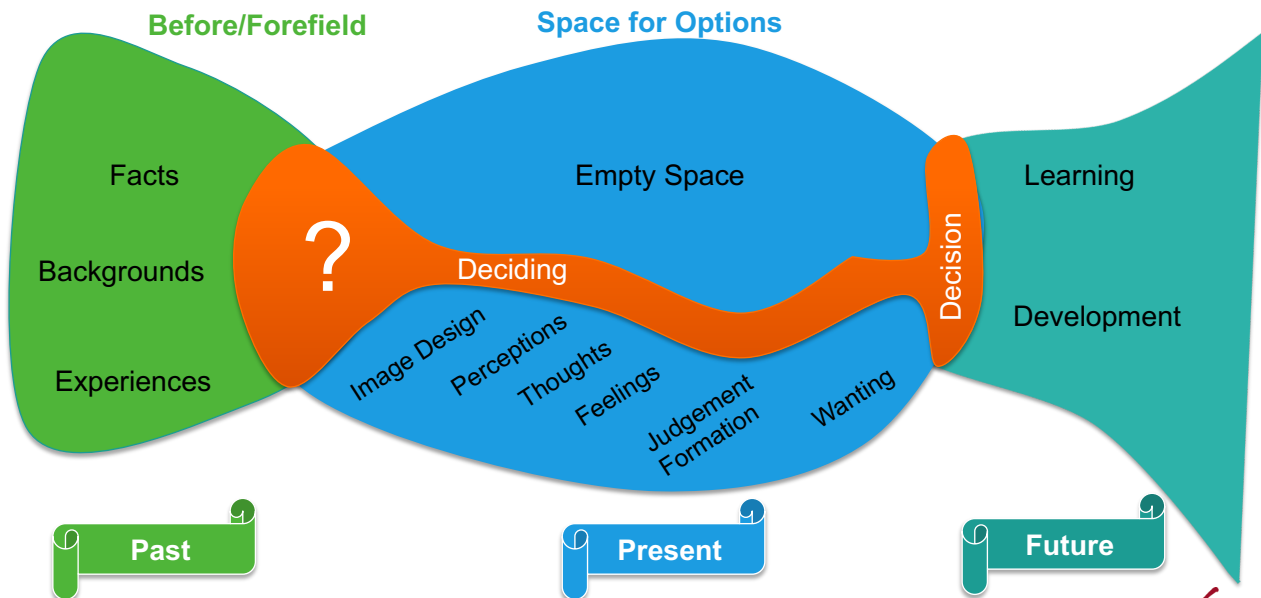


© Trigon Entwicklungsberatung

10



Deciding and Decision - Two very different kinds of actions along Past, Presence and Future

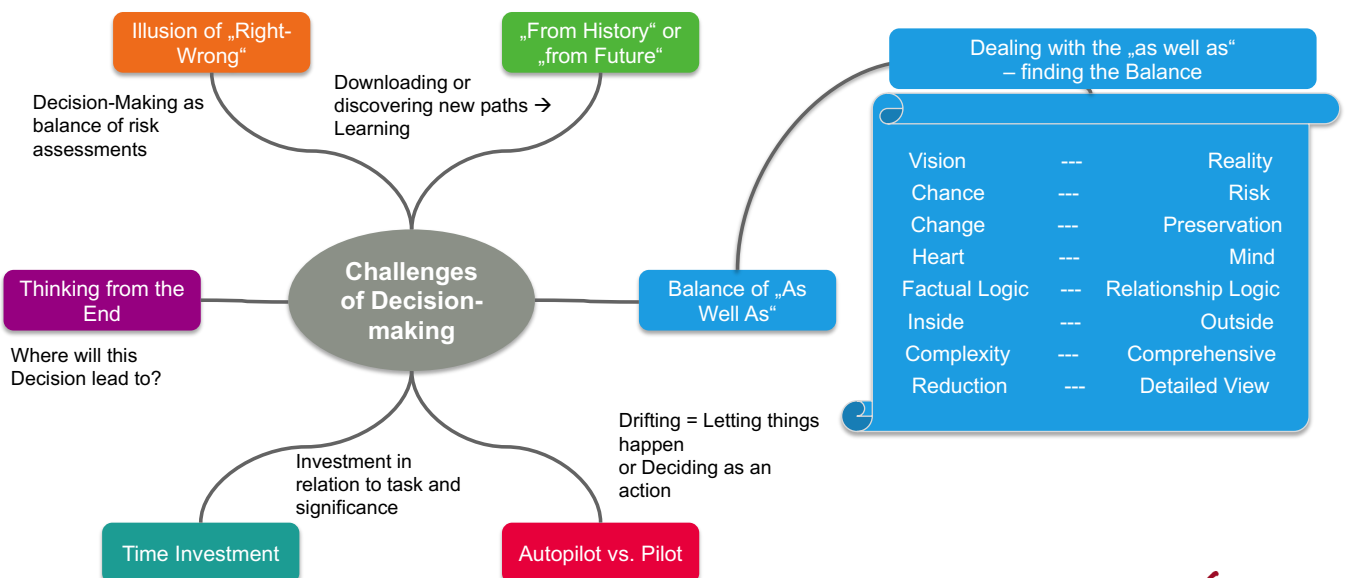


Otmar Sutrich: „How Organizations make good Decisions“

© Trigon Entwicklungsberatung

11

The Various Challenges in Decision-Making



© Trigon Entwicklungsberatung

12



4. Process-models of Decision-Making

- A few Examples of different Approaches

© Trigon Entwicklungsberatung



Process of decision making

Level	Question arises	First picture	Information and Feedback 1	Working in Solution 1	Information and Feedback 2	Working in Solution 2	Make a decision
TOP							
Directors							
Managers							
Coordinators							
Internals							
Senior Leadership M							

© Trigon Entwicklungsberatung



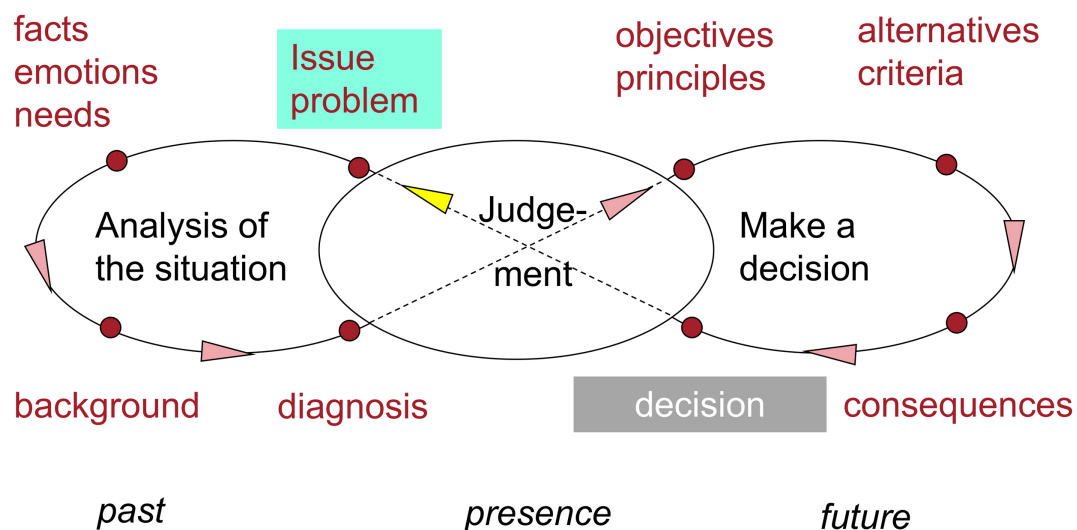
Stages of a decision-making process

Preparation	Task, objective Delimitation/extension of the order Guidelines, framework conditions, resources Mode of operation, time Group formation, roles, tasks, competencies (especially: who decides how?)	10%
Image design	Developing alternative solutions, collecting compaction to realistic alternatives Collect criteria	35%
Judgment formation	Prioritizing the criteria Discuss pro and contra in detail Consequences Personal Preferences	35%
Decision	Selection, decision Decision (Who? What? With whom? When? How? Where?) Saving the results Commitment, review date?	20%

© Trigon Entwicklungsberatung



Process of solution finding and decision making



© Trigon Entwicklungsberatung



DECISION

Content What will be decided?		Criteria	
Expected result? Rejected alternatives?		Until when? Milestones	
Who responsible? With whom?		Who decides?	
Power Frontiers		Majority / 51 - 67 - 75 % Installation / disqualification	
Budget		Planned information flow What? When? To whom?	
Evaluation Date		What if budget exceeded? Return procedure?	

© Trigon Entwicklungsberatung



Kanban Teamboard

Upcoming tasks	Next.	team person	In progress	Done	Necessary aftercare
		1			
		2			
		3			
		4			

© Trigon Entwicklungsberatung



Deciding in Consent

Element of Sociocracy

- Agile principle, not 100% solutions, but learning as fast as possible
"Good enough for now and safe enough to try!" -
Implement and then improve decision iteratively
- Faster decisions with less discussion effort
- Group intelligence is widely used -
preferably in a heterogeneous team
- No right for anybody for a strict veto;
instead of veto: **serious objection**, if the decision is to be made on real,
identifiable risks and can lead to risks for the company's goal
- Structured neutral moderation with 4 rounds, in which everyone in the circle brings
his/hers contribution - one after the other in peace - no direct reaction!
- Provide all important information to everyone before the appointment

© Trigon Entwicklungsberatung



Deciding in Consent

Element of Sociocracy

1. Information session

The participant who initiated the decision presents the basis and background.

Afterwards: each person can take a stand in a circle one after the other on the following two questions:

Are there any questions about the proposal?

What is missing to form an opinion?

2. Opinion-forming round 1

How does each participant feel about the proposal?

What feelings do you get?

The initiative participant gives answers

3. Opinion-forming round 2

What is the opinion on content now?

What's your feeling now?

Are there any ideas for solution improvements in the circle?

The decision can be tested at a defined time =

e.g. four weeks of experience and

then back to discussion in the team to agree on the further course of action

4. Round of consensus

Are there any serious objections to the latest version of the proposal?

Otherwise decision and resolution

© Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

Mindfulness

2.17

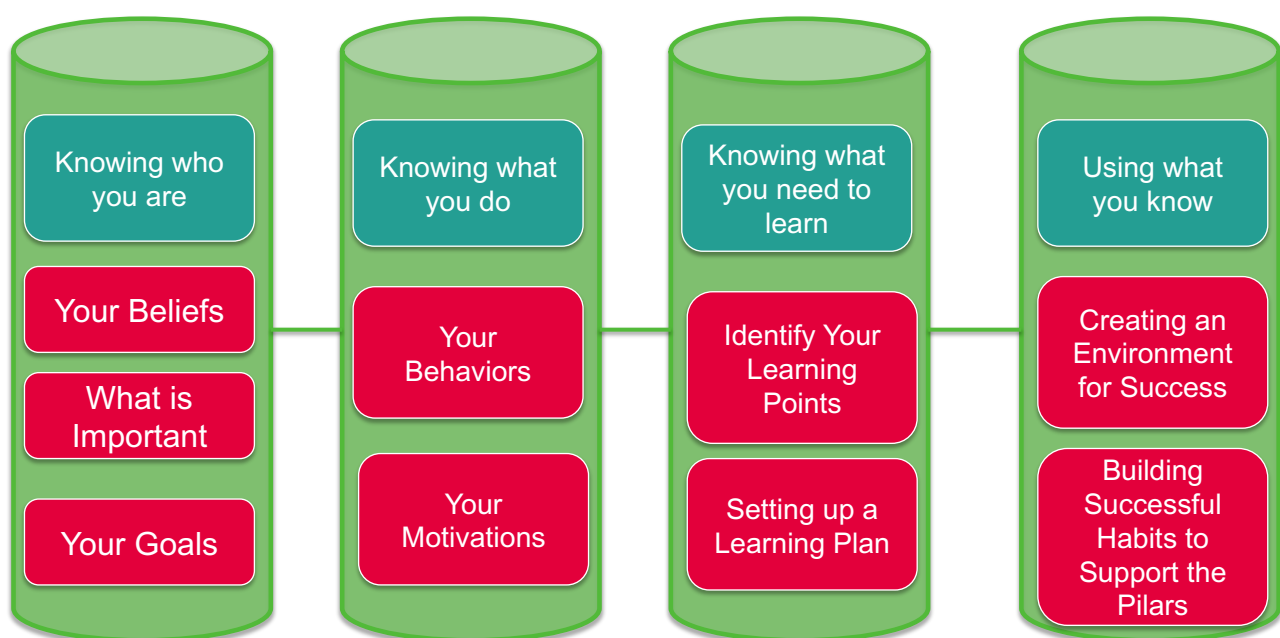
Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



Co-funded by the
Erasmus+ Programme
of the European Union



Four Pillars of Self- Leadership



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Awareness and Focus as the key to Self-leadership



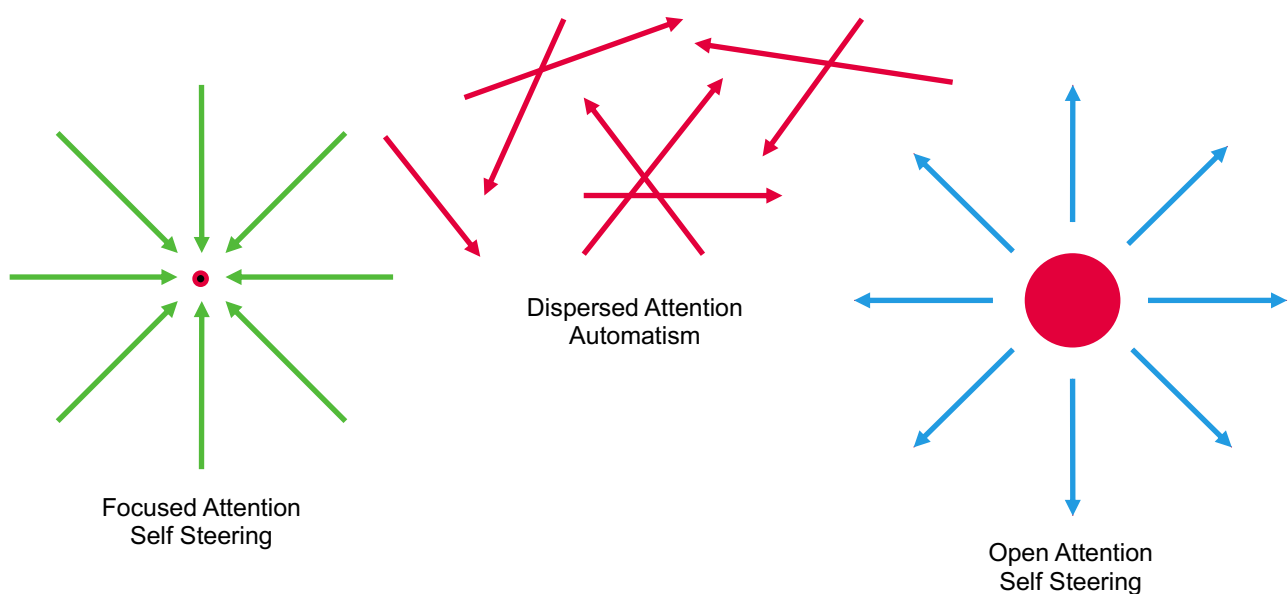
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Dispersed, Focused and Open Attention



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Mindfulness – A Definition by Jon Kabat-Zinn

“**Mindfulness** is awareness that arises through paying attention in a specific way:

- On purpose
- In the present moment
- Non-judgementally. ”

Jon Kabat-Zinn

Mindfulness means maintaining a moment-by-moment awareness of our thoughts, feelings, bodily sensations, and surrounding environment, through a gentle, nurturing lens. ... When we practice **mindfulness**, our thoughts tune into what we're sensing in the present moment rather than rehashing the past or imagining the future.



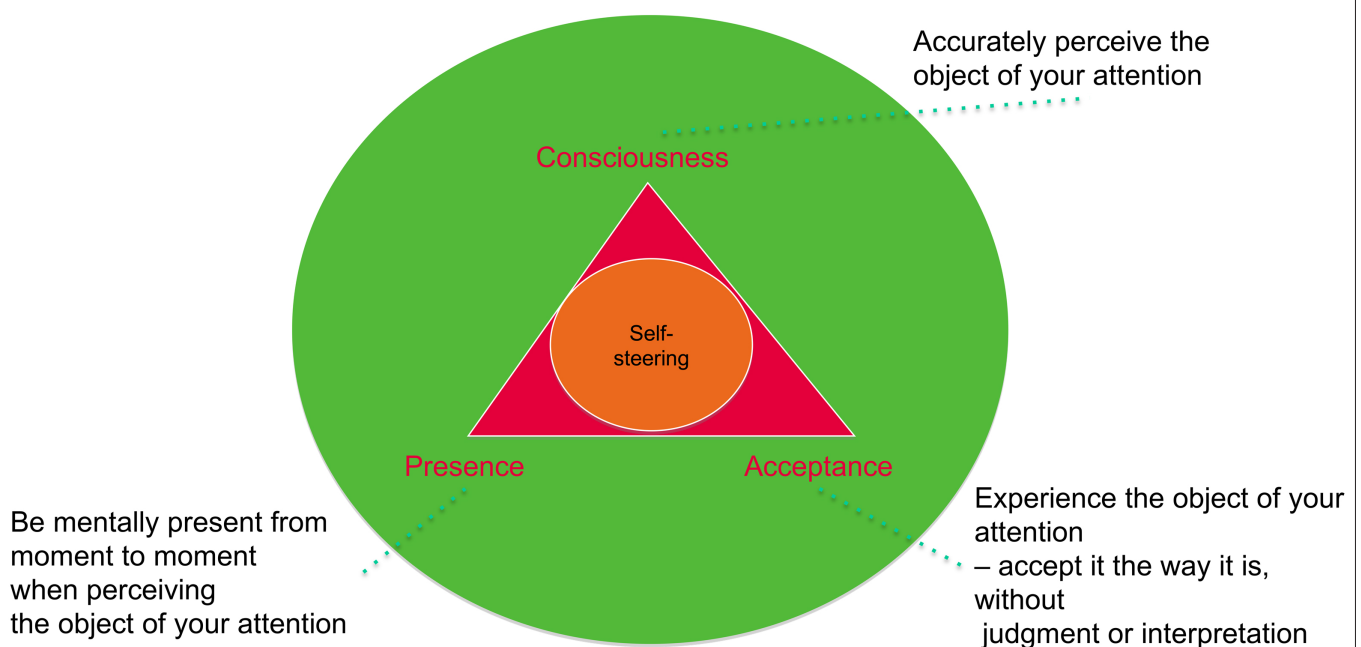
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Characteristics of Mindful Consciousness



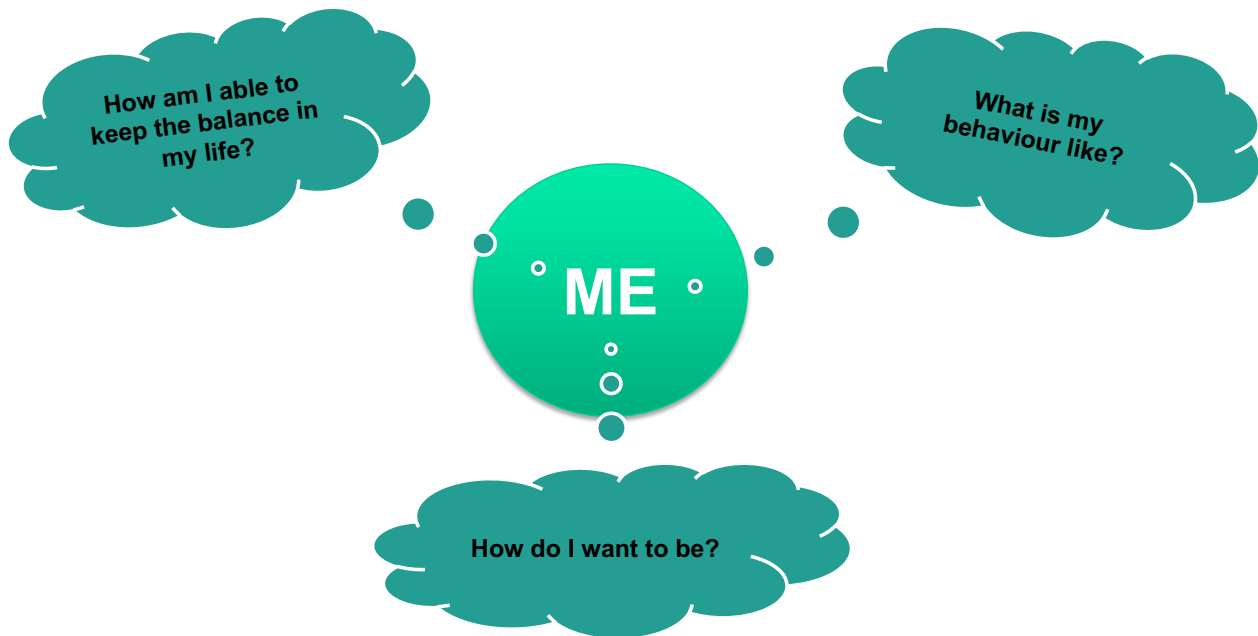
Co-funded by the
Erasmus+ Programme
of the European Union



©Trigon Entwicklungsberatung



Self-Reflection Awareness



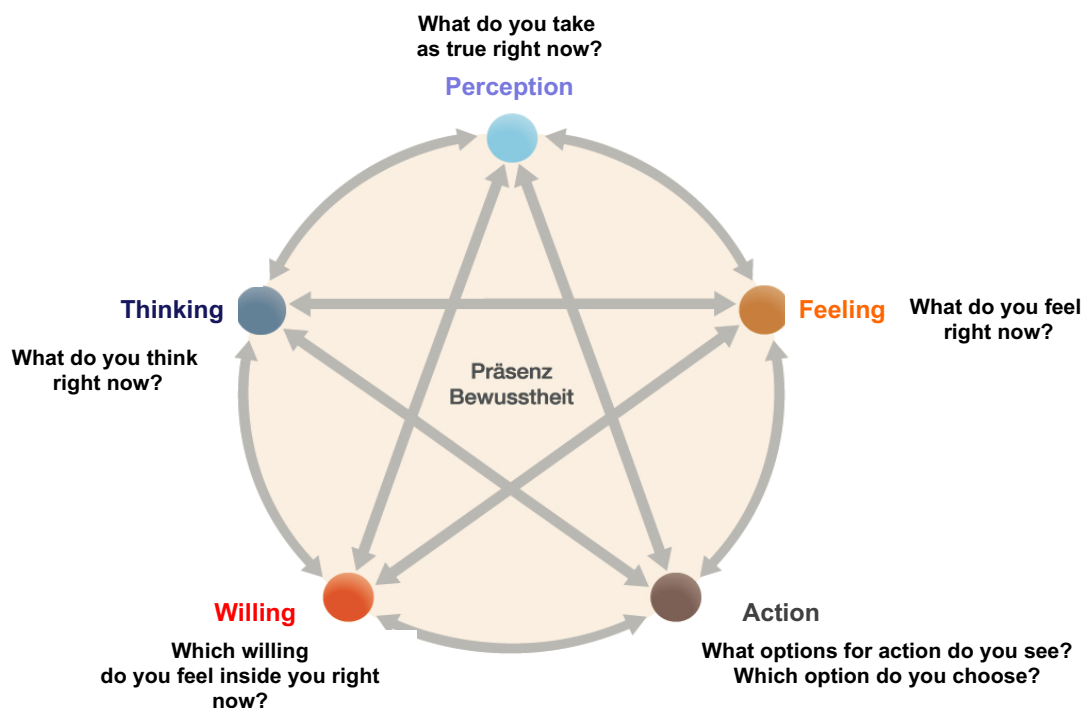
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Mental "muscle training" with the Wheel of Awareness



© Trigon Entwicklungsberatung



What is mindfulness?

<http://www.achtsamleben.at>

- Mindfulness is the intended **Drawing attention** to the **present**, i.e. to the present moment, to the present experience. Mindfulness means conscious **observation**, whereby the observation is made from a certain **posture**. This is
 - benevolent, accepting,
 - non-judgmental, non-judgemental,
 - not classifying or categorising,
 - not identified with the object of observation, but participating directly in the experience,
 - impartial, open,
 - viewing the world as if through the eyes of a child "(Beginner's Spirit)



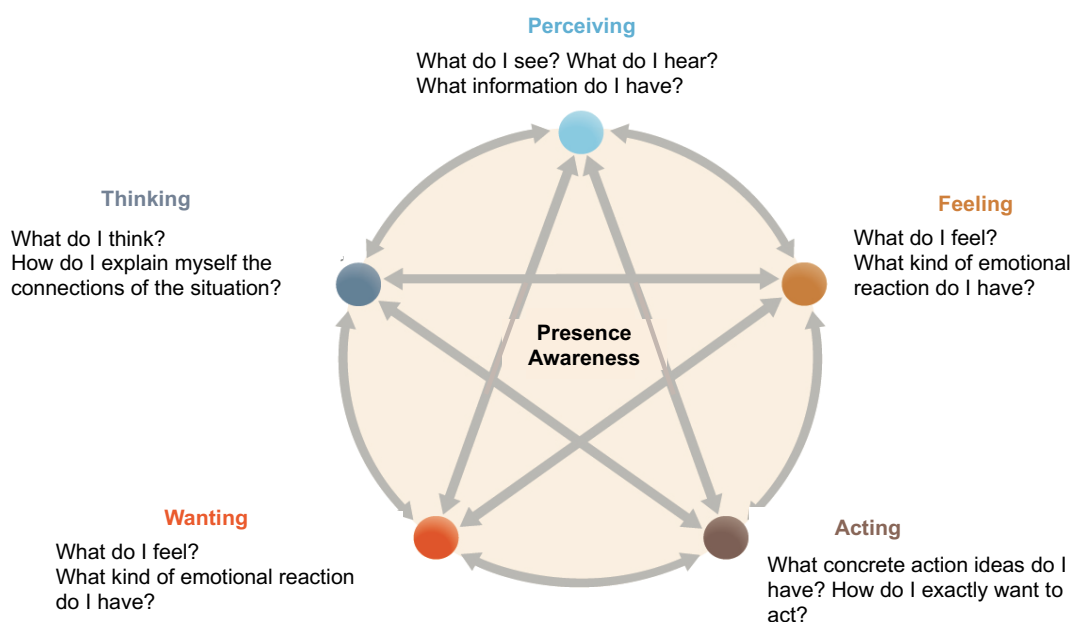
Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Awareness for the Functions of Consciousness



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung

10



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 1

1. Perceiving and Sensing the Body (Body Sensations)

A: What do you see right now?

B: Spontaneous answer

A: Thank you! And what do you feel right now in your body?

B: Spontaneous answers

A: Thank you!

.....

B: What do you see right now?

A: Spontaneous answer

B: Thank you! And what do you feel right now in your body?

A: Spontaneous answer

B: Thank you!

.....

A: What do you see right now?

B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 2

2. Perceiving and Thinking

A: What do you hear right now?

B: Spontaneous answer

A: Thank you! And what do you think right now?

B: Spontaneous answer

A: Thank you!

.....

B: What do you hear right now?

A: Spontaneous answer

B: Thank you! And what do you think right now?

A: Spontaneous answer

B: Thank you!

.....

A: What do you hear right now?

B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 3

3. Perceiving, Feeling and Willing

A: What do you hear right now?
B: Spontaneous answer
A: Thank you! And what do you feel right now?
B: Spontaneous answer
A: Thank you!! And what drive do you feel right now in your will?
B: Spontaneous answer
A: Thank you!
.....
B: What do you hear right now?
A: Spontaneous answer
B: Thank you! And what do you feel right now?
A: Spontaneous answer
B: Thank you! And what drive do you feel right now in your will?
A: Spontaneous answer
B: Thank you!
.....
A: What do you hear right now?
B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 4

4. Feeling, Willing and Thinking

A: What do you feel right now?
B: Spontaneous answer
A: Thank you! And what need do you feel right now?
B: Spontaneous answer
A: Thank you! And what do you think right now?
B: Spontaneous answer
A: Thank you!
.....
B: What do you feel right now?
A: Spontaneous answer
B: Thank you! And what need do you feel right now?
A: Spontaneous answer
B: Thank you! And what do you think right now?
A: Spontaneous answer
B: Thank you!
.....
A: What do you feel right now?
B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 5

5. Feeling, Willing (needs) and acting

A: What do you feel right now?
B: Spontaneous answer
A: Thank you! And what need do you feel right now?
B: Spontaneous answer
A: Thank you! And how do you feel that need right now inside of you?
B: Spontaneous answer
A: Thank you! And what could you actually do in order to fulfill your need?
B: Spontaneous answer
A: Thank you!
.....
B: What do you feel right now?
A: Spontaneous answer
B: Thank you! And what need do you feel right now?
A: Spontaneous answer
B: Thank you! And how do you feel that need right now inside of you?
A: Spontaneous answer
B: Thank you! And what could you actually do in order to fulfill your need?
A: Spontaneous answer
B: Thank you!
.....
A: What do you feel right now?
B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Exploring the Functions of the Awareness Wheel – Exercise Repeated Questions 6

6. Analyzing behavior under stress

A: Please tell me about a socially stressful situation
B: Spontaneous answer
A: Thank you! What do you feel in such moments when you reach your limit?
B: Spontaneous answer
A: Thank you! What do you do in such a situation to save yourself?
B: Spontaneous answer
A: Thank you! And which need do you actually feel in such a situation?
B: Spontaneous answer
A: Thank you!
.....
B: Please tell me about a socially stressful situation
A: Spontaneous answer
B: Thank you! What do you feel in such moments when you reach your limit?
A: Spontaneous answer
B: Thank you! What do you do in such a situation to save yourself?
A: Spontaneous answer
B: Thank you! And which need do you actually feel in such a situation?
A: Spontaneous answer
B: Thank you!
.....
A: Please tell me about a socially stressful situation
B: etc. -> looping



Co-funded by the
Erasmus+ Programme
of the European Union



© Trigon Entwicklungsberatung



Effects of regular and persistent mindfulness practice:

- I am more present in the encounters with other people
- I learn to understand myself better through introspection and to follow my (spiritual) path more efficiently
- I am more creative
- my intellectual capacity increases
- experiences of physical and emotional discomfort cause less suffering
- physical and mental pleasures become more fulfilling
- I can resist an unwholesome desire better.

Shinzen Young. "Break through Pain." 2004. S. 23



Co-funded by the
Erasmus+ Programme
of the European Union



©Trigon Entwicklungsberatung



Organization development for Estonian schools

Training for school board trainers

2.18 Individual and organisational
learning processes.

Learning organization

Learning cultures

Trigon Entwicklungsberatung
Unternehmensentwicklung und
Konfliktmanagement GmbH
Luisenstraße 1, D-80333 München
T: +49/89/24 20 89 90, F: +49/89/24 20 89 99
trigon.muenchen@trigon.de, www.trigon.de



7 basis processes of change

Processes of Diagnosis

Future-design Processes

Psycho-social Processes

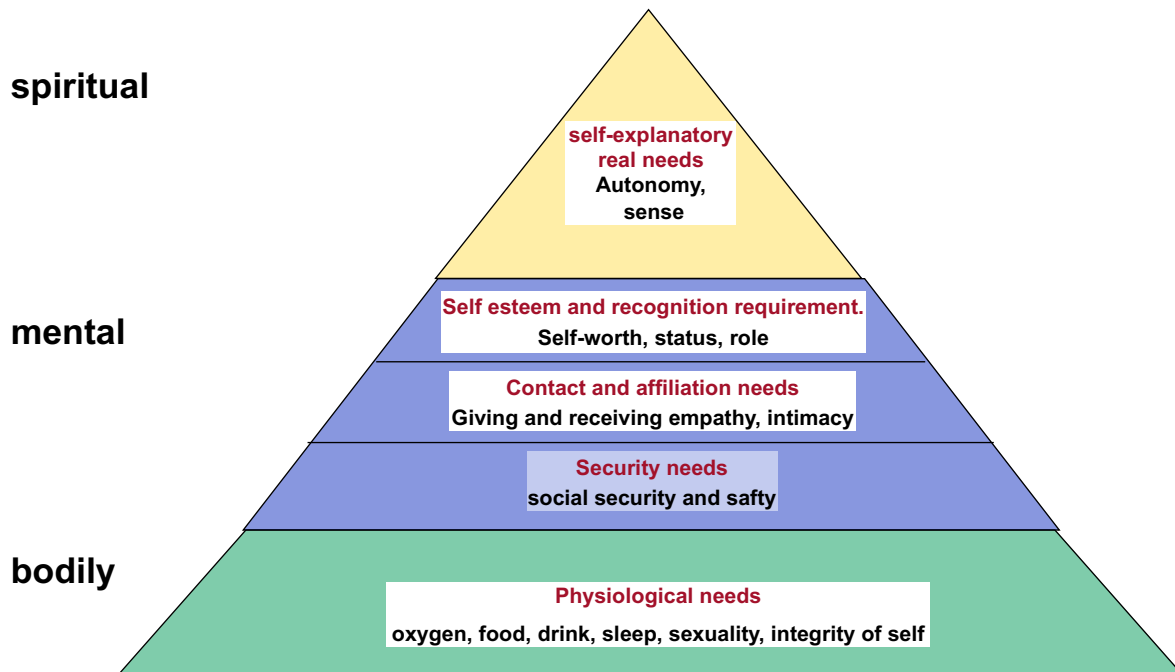
Information Processes

Learning Processes

Implementation Processes

Leading and managing the Change Process

basic human needs



After A. Maslow: Motivation and Personality, Reinbek. Hamburg. 2002
© Trigon Entwicklungsberatung

Individual learning



© Trigon Entwicklungsberatung

Learning must
make it easier!!!

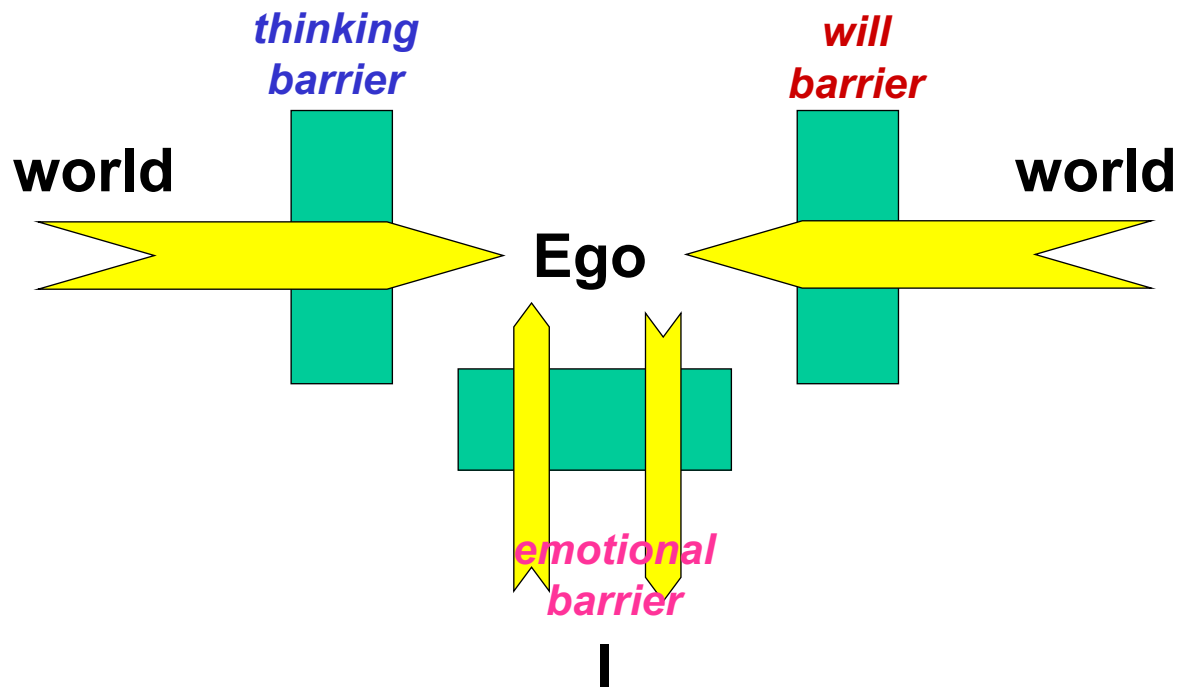


© Trigon Entwicklungsberatung

Learning doesn't mean
to fill a barrel,
but
to light a fire!

Learning barriers

according to Coenrad van Houten



© Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

Overcoming barriers ...

Emotional barrier

- What do I not want to admit to myself about myself?
Which inner transformation seems necessary, but has an inhibiting effect?

Will barrier

- What fear of change blocks me?
What decision am I balking at?

Thinking barrier

- What comes to me from the world?
What do I think I know and what do I understand? And what not?

© Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

Guiding principles of motivated learning

- Learning is to discover, comprehend, understand, accept, appropriate
- Learning takes time
- Learning should be initiative
Discovering own potentials, future necessities
- In self-responsibility
Development of goals, own learning path, process control
- Define learning corridors
Securing the future of an organization

Learning - Cultures According to Edgar H. Schein 1997

Hierarchy thinking in the cockpit (To Blake, Mouton, Canse. 1989)

- Analysis of an aircraft crash just a few km from the runway
- Flight recorder: Flight engineer has warned loudly for minutes
- Pilot circled on, because of small difficulty with the landing stick
- Repetition in the simulator with the same result
- **Only if the person who called was a pilot colleague of the same or higher rank was the information adequately considered.**

Finding: Hierarchy can stand against the right solution

Open question: How can existing knowledge be used unconditionally?

Professional groups form cross-organizational cultures

Fishers

Miners

Teachers

Salesmen

Assembly workers

IT service technicians

Managers/CEOs

- Analogue careers
- Commonalities in the learning/training contents
- Similar work experience and work requirements
- Encounters of equal judgements and prejudices

Emotional barriers create hurdles

"Innovation Management"

- Company boss: Hoping for adaptation to market requirements
- Managers: The opportunity to make career for themselves
- Project manager: Opportunity to finally implement a long-cherished idea
- Workers: Another new trial without hope of change

What can you do about it?

- Which current question could be the reason ...
- How to ideally assemble a professional heterogeneous group?
- How to create a climate in which learning cultures become visible side by side?
- How to evaluate the results, find appropriate decisions?
- How to confirm?
- How to develop a new culture?
- How to communicate the colleague at the same and higher level?

Organizational learning



Safe in the future is

"Stormy Sea"

speed of change
continues to grow

Increase in information and
knowledge stocks

problem solutions
become internationally
comparable

Consequence:
Half-life of knowledge
decreases further



Solution: Building Collective Intelligence

Open-minded, receptive, quickly learning and always curious **people**

Creating **conditions for the** transfer of knowledge (methods & instruments)

Network - Special laws of interaction between autonomous individuals

Spontaneously form groups for a **goal** and then dissolve again

© Trigon Entwicklungsberatung



"Fail - try again - fail better. "

Samuel Beckett

© Trigon Entwicklungsberatung



Learning processes in the development phases

First pioneering phase:

- Individual learning
- Personal learning of the pioneering persons is supported by imitation/identification learning
Learning from other people

Second phase of differentiation:

- Organised learning is transferred to the organisation
- Some special agencies are acting on behalf of the organisation in the learning process; transfer and implant rational learning content

3rd integration phase:

- Self-responsible learning
- The organization becomes aware that it is an evolving organism.
Learning is specifically promoted. Team development. Integrative processes

Fourth association phase:

- Learning with partners is the key quality of external networking
- The organization has learned to learn and sees itself as a learning impulser in its environments

A "learning organisation" ...

- regards learning as a key competence for securing the future
- enables the learning of all members of the organisation
- is continuously transforming itself.

Short definition of a 'learning organisation' (Pedler, Boydell, Borgoyne)

$$L \geq C$$

The rate of learning must be equal to,
or greater than the rate of change in its environment,
should be the logo of any learning organisation.

Reg Revans

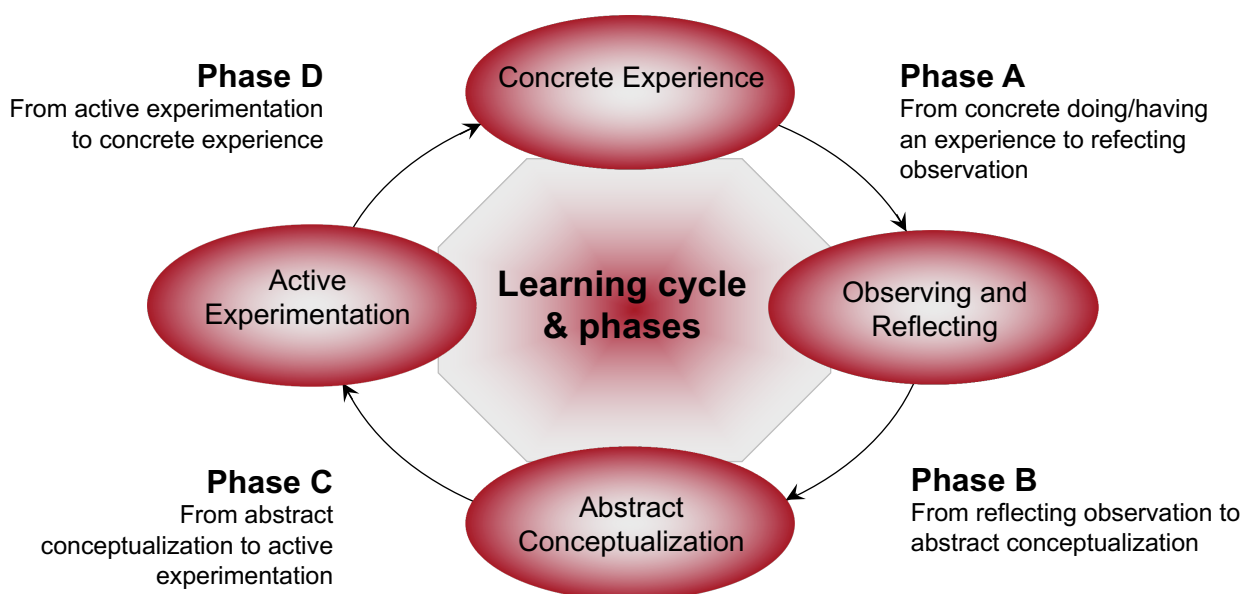
The leadership dilemma: practiced incompetence (Chris Argyris)

- Most of us admire competence. ...
- Most of us fear incompetence very much. ...
- Incompetence with managers or organizations is the continual causation of unintended consequences. Usually, we justify such repeated failures with a lack of ability and skill.
- But the most difficult-to-correct incompetence among executives is closely linked to skill. Especially intelligent, dedicated and hard-working managers use extremely polished skills and still cause consequences that they do not intend.
- ???

© Trigon Entwicklungsberatung



Learning cycle and learning phases

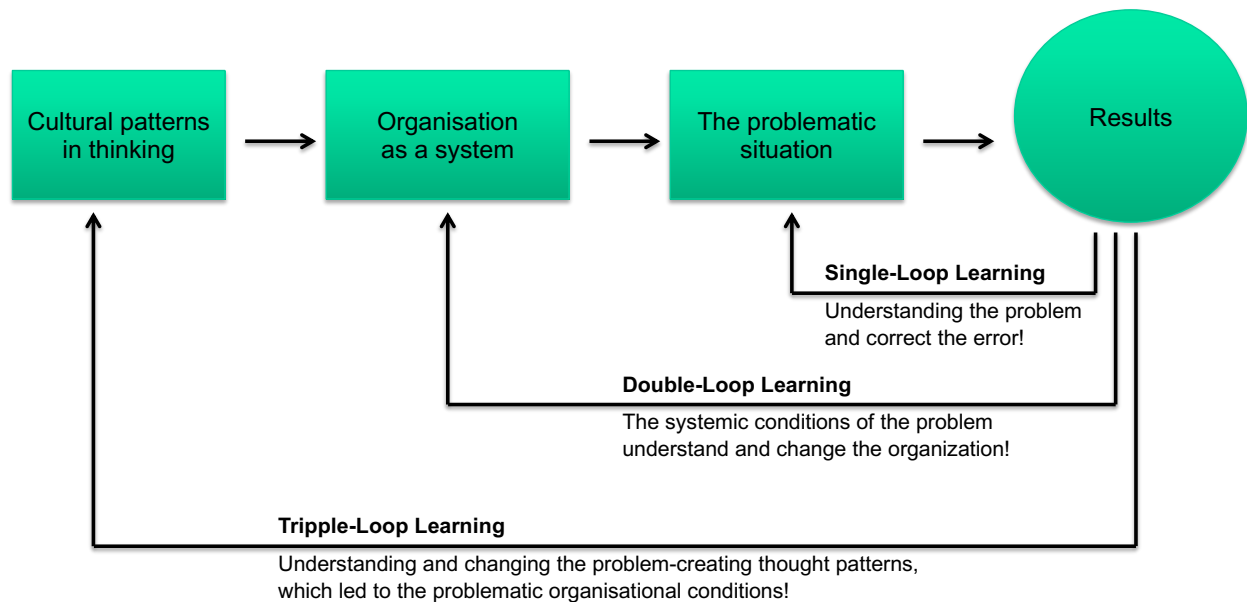


© David Kolb

© Trigon Entwicklungsberatung



Triple Loop Learning – Change patterns



© Trigon Entwicklungsberatung



Criteria of organizational learning ...

- Multiple functions/organs involved
- Super-personal learning
- New spaces for experience and encounter tapped between learning cultures
- New skills emerge
- Networks, informal contacts
- Sustainable behavioural change

Recognizing the Essence

Changing the patterns

Overcoming one's own limits

Willful seizure

Conscious, targeted, planned, guided redesigning and redesigning

© Trigon Entwicklungsberatung



instruments

© Trigon Entwicklungsberatung



instruments

- Mentorships, sponsorships
- Multipliers
- Internal Support, Change Managers, Change Agents
- Supervision, Intervention
- Meetings, Workshops, Trainings, Coachings
- Intranet, email community with regular exchange of information
- Job rotation
- Conscious diagnosis – conscious evaluation
- Conference Calls
- Regular reviews, lessons learned
- Final presentation of the project
- Integrate external and internal speakers on a topic-specific basis
- Knowledge database, responsible topic officers
- Anchoring feedback and error culture

© Trigon Entwicklungsberatung



After Action Review

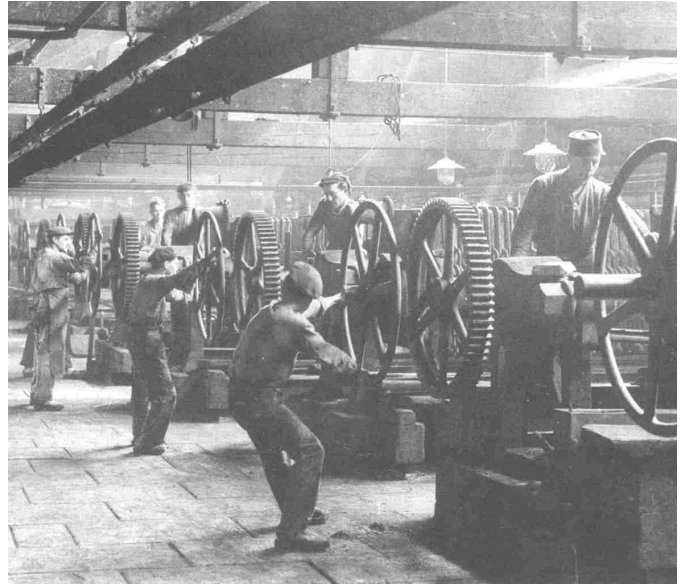
- Evaluation of a currently completed process step
- Showing what really happened
- Listening, Perceiving
- No embellishment
- Please no sensitivity
- Say it the way you see it!
- Anyone in evaluation who also participates in action
- No reports to the top or to the outside

After action review

1. What was the plan?
2. What happend really?
3. What makes the difference?
4. What do we learn from it?

Initiate learning partnerships

- Learning group of voluntary participants meets on their own topic
e.g. 1 x monthly
- Agreement on procedure and milestones of cooperation
- Goal is learning in a team, exchange of experiences, reflection, feedback
Up-to-date information on operational developments
Transfer of background knowledge, e.g. on company policy, history ...
- Additional intervention/supervision possible for concrete projects in the field of work
- Consultation of a coach if required
(e.g. manager of the next higher level)



© Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

Concrete exercise: Creating a learning and error culture ...

3 people sit down in trios and report:

- What was my most serious professional mistake in the last year?
- What insight have I gained from him?
- What's different today than before the mistake?

© Trigon Entwicklungsberatung

 **Trigon**
Entwicklungsberatung

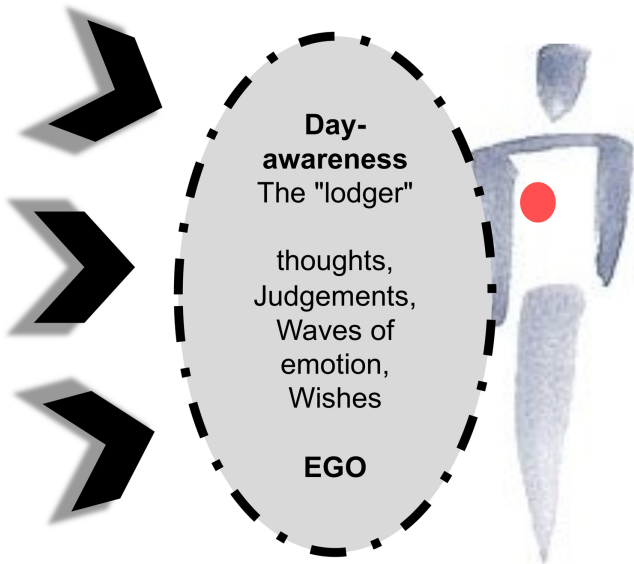
Introduction to meditative practice

Studies prove positive effects of meditation



**Qualities
human
Conscious BEING**

Higher
I C H



Resting -
awareness

insights,
sensed
feelings,
Needs

SELF

1. exercise series

From the perception training
for meditative feeling recognition

Objective

- I have learned to focus my attention more strongly (ability to concentrate)
- I can think what I want better (self-determination)
- The step from a purely differentiated analytical view for holistic perception has been experienced
- I have studied the various mental gestures
 - the devotional being in the holistic view and
 - of being with me in the inner imaginationcan be experienced as different emotional experiences

"Understanding" the stone 1

1. Sit comfortably upright
2. Calm down, watch your own breath
3. Perceive the stone as precisely and in detail as possible
4. Close your eyes, see the stone like this
5. A holistic view of the stone
6. Close your eyes, see the stone like this
7. Imagining the stone inside
8. With eyes closed, re plasticize the stone (Outline, color, shape, area, ...)
9. Reflection: What have I experienced, felt?
What was in one phase, what was in the other phase?

} 3 x

**"We are about to awaken,
when we dream we're dreaming."**

Novalis

"Understanding" the stone 2

1. Sit comfortably upright
Calm down, watch your own breath
2. "I look at the stone!"
(Attention goes from me specifically to the stone)
3. close one's eyes
4. "The stone is visible... - ...shines on me."
= devotion in silence, immersion
5. close one's eyes
Imagine the stone inwardly and build a living relationship
Thinking thoughts that have to do with the stone
6. Reflection: What have I experienced, felt?
What was in one phase, what was in the other phase?

"Understanding" the stone 3

1. Sit comfortably upright
Calm down, watch your own breath
2. "The stone is visible... - ...shines on me."
(I am quite passive, while paying attention to being illuminated)
= devotion in silence, immersion
3. I close my eyes and recreate the stone in the inner picture
4. I observe how the stone expresses itself in me:
Empty consciousness...
What thoughts go through my mind?
What do I feel?
5. Reflection: What have I experienced, felt?
What was in one phase, what was in the other phase?

2. Exercise series

From pictures of the past in your mind
to meditative recognition of the essential

Objective

- I have learned to concentrate better
- I can think what I want better
- I have practiced to perceive holistically
- I have studied the various mental gestures
 - the surrender of being in a holistic view (AMAZING) and
 - of being with me in inner imagination (FOCUSING)can be experienced as different emotional experiences
- I got to know the phases of a structured meditation
- I approached a person in a meditative, tentative way and tried to get to recognize him or her, to understand him or her better - and the relation to me

Meditation ist most free decision in your life

- Every meditation is a new experiment with me as an instrument
- Any expectation is a hindrance
- Every deeper experience is a gift
- When an inner image emerges - recognize it consciously before it quickly disappears
- Meditation is not so much a search experience as it is an experience of being
- There is no measuring criterion for success - except myself
Only my inner experience can tell me whether I am wrong,
or to advance to a truthful, coherent content
- If I don't want to succeed, I'm taking more time right now, to try again
- "Meditate quickly" is not a serious option

"Awakening" on a person

The necessary basic attitude

Core questions of the soul

- **Who are you?**
- **How are you?** Honest sympathy (sympathy/compassion)
- **What can I do for you?** be willing to do what is necessary (conscience)

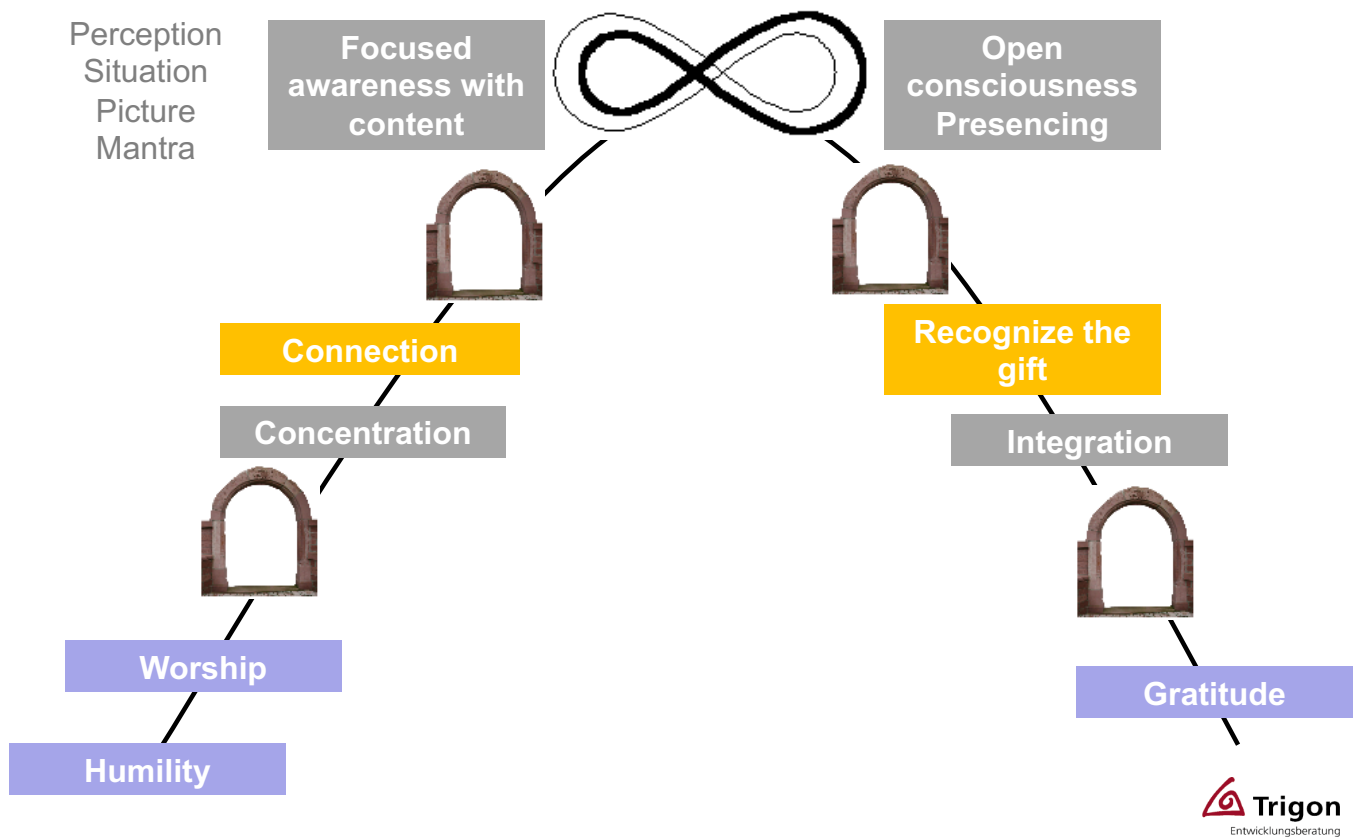
From: Bos, L. Christuswirken im Sozialen. Dornach 1996

Not structures should be social - but the individual should have a social effect

"awakening" on a person 1

1. Sit comfortably upright
Calm down, watch your own breath
2. I choose a human being
I want to deal with this person with the greatest respect for his personality –
without any judgement
3. I try to imagine his/her face, his/her figure - inside me
4. I observe him/her inwardly, how he/she moves - especially the walk
5. I vividly remember some of the life situations we had together
6. What is the feeling about this person?

Dimensions of a meditation



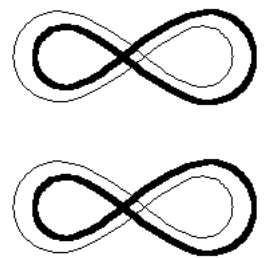
"Awakening" on a person 2

1. Sit comfortably upright
Calm down, watch your own breath
2. I choose a human being
I want to deal with this person with the greatest respect for his/her personality - without any judgement
3. I get this person alive in various situations before my inner eye.
What do I feel inside?
4. I try to experience and understand the current fateful living conditions around this person as a whole, what shows up, reveals itself to me?



"Awakening" on a person 3

1. Sit comfortably upright
Calm down, watch your own breath
2. I choose a human being
I want to deal with this person with the greatest respect for his/her personality - without any judgement
3. I get this person alive in various situations before my inner eye.
What do I feel inside?
4. I try inwardly to sense,
which question of life this person carries within him/her
5. In light of this experience, what does it mean to me?
What can I be for this person? What do I want to do?





Koolitusmaterjalide, juhendraamatute trükk ja köitmine Kolm Lõvi Trükikeskus
info@trykikeskus.ee • www.trykikeskus.ee