

# Your inner game

Frameworks and tools to deepen  
your self-awareness so you can  
skilfully work with your strengths  
and shadows



Mid-Level  
Investor



Senior Investor

# Your inner game

Deepening self-awareness and raising consciousness so you can skilfully work with your strengths and shadows

The inner game reflects the science and leadership theory that states your ability to fully express your skills and talents, embrace complexity and make great decisions, build the collective intelligence of your teams and enjoy a sense of personal flourishing depends on your ability to work with your ego, identity, mindset and beliefs. That's because the inner game is always meditating the outer game, creating strengths and shadows.

## Working with strengths and shadows

To best work with your strengths and shadows, you need to intimately understand what's creating and driving them, and pay attention to how they're influencing your outer game moment to moment.

That process unpacks how your personality, your personal history and core threat and trust systems shape your sense of self (ego and identity) and how you view the world, being your mindset and belief systems. Combined, these are commonly called your internal operating system.

Your thoughts and emotions are shaping your internal operating system throughout your life – mostly unconsciously. The inner game uses tools and habits to make the unconscious conscious, thereby reducing the extent to which shadows undermine your outer game.

Personality preferences, above / below the line, drama triangles, re-writing stories and the SCARF model are among our favourite tools. Play, self-compassion and curiosity are essential traits to cultivate throughout this discovery process. Even still, upgrading your internal operating system can be confronting, and if there's unresolved trauma in your life, it's important you be supported by a mental health professional.

“Everyone carries a shadow, and the less it is embodied in the individual's conscious life, the blacker and denser it is”

Carl Jung

## Adaptive challenges

Insights generated by these tools are captured as an adaptive challenge. Your adaptive challenges reflect the most significant mindset changes you could make to improve your investment decision-making, leadership effectiveness, career success or life fulfilment. We often start that inquiry by looking at what's getting in the way. Here are the most common ways I see investors and leaders obstructing their own success and the success of their teams:

- Reacting with aggression / blame when the market moves against them or others, triggering their own and other's threat responses, which in turn impedes creative capacity and clarity of thought.
- Identity hooked on being a great fund manager, creating a fear of making

mistakes and clouding judgement when the market moves against them.

- Narrow perspective on own investment priorities, creating obstruction when working on ESG integration.
- Fear of feedback conversations going poorly and so avoiding them or not giving clear feedback, limiting other's growth potential and creating disconnect in relationships.
- Self-worth tied into investment performance creating poor delegation and excessive control, which in turn hampers others' growth opportunities.
- Shutting down other people's ideas to protect own ego's need to be right.
- Holding back sharing views and challenging others for fear of being wrong, which stunts the group's ability to generate the creative abrasion needed to generate breakthrough thinking.
- Ego's yearning for quick success stops leader from bringing the team along with them, creating disengagement and ultimately slowing the change process.

## Leadership effectiveness improves as consciousness evolves

**Bob Anderson, founder,  
The Leadership Circle**

It's important to note we all have ways we self-sabotage; it's part of the human condition and is driven by our threat and trust systems. Connecting with that reality and investigating what needs to change invites us to discover:

- What we're thinking and doing that works against how we want to be, and the cost of that mal-adaptive behaviour.
- How our ego and identity benefits from the current behaviour, creating a competing commitment.
- The beliefs and stories we make up to create that competing commitment.
- How we can re-wire our identity, beliefs and stories to support our adaptive challenge.

The Immunity to Change X-Ray developed by Bob Kegan and Lisa Lahey is the primary map that charts that discovery.

## Mastering your inner game

Inner game mastery is a lifelong endeavour with a proven, non-linear path to success. Positive and humanistic psychology, neuroscience and ancient wisdom reveal the practice strokes, workout routines, and coach and team support needed to lift your game.

We're excited to share some of our favourite ideas and tools in this guide to support your inner game. It's all part of our mission to create a diverse and human-centred investment management industry.



Yolanda Beattie  
Founder  
Future IM/Pact

# Tools snapshot

These are but a sample of our favourite tools designed to help you master your inner game. When expertly facilitated, the layers of insight that can be revealed through these tools can't be overstated! We recommend you dig deep with the support of a coach experienced in consciousness or inner game development. Enjoy!

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Understanding personality	Understanding our personality and how it can be perceived by others is a great way to explore how we show up. Often our biggest growth potential lies in dialling back our dominant style and practicing our less dominant preferences. We use the framework provided by Clarity4D and based on Jungian psychology.
The Line	The line is the ultimate self-awareness tool that we gratefully share from The Conscious Leadership Group. It provides a simple, dichotomous model for seeing how we're showing up – triggered by ego threats (below the line) or untriggered (above the line). Deep, lasting change happens from this level of awareness.
Drama triangles	Almost all interpersonal conflict arises out of drama where well-worn scripts of victims, villains and heroes drag us below the line. When we're stuck in drama we're blaming others and committed to being right. Owning and unpacking our triangles helps us see what stops us from achieving our goals and provides a powerful self-coaching framework. This is another great tool from The Conscious Leadership Group.
Stories and opposites	The stories we tell ourselves shape our perception of the world. Believing them to be true clouds our judgments about ourselves, others and ideas. Looking through them allows us to expand our view of reality, enabling curiosity and open-mindedness. Byron Katie's framework for The Work is our reference point.
SCARF	Dr David Rock from the Neuroleadership Institute found our threat systems can be categorised into status, certainty, autonomy, relatedness and fairness threats. Understanding your and other threat triggers helps you work with them.
Immunity to Change X-Ray	Change is hard and most of us fail despite best efforts to shift behaviours, even when the stakes are high. Determined to change this common reality, behavioural psychologists Kegan and Lahey, developed a framework that helps learners uncover the deeply embedded barriers to change before mapping new ways of being in a format that encourages and enables feedback and shared discovery.

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# Understanding personality

Personality preferences shape our perceptions and behaviours. Knowing yours and others is incredibly helpful for understanding how you show up for others.

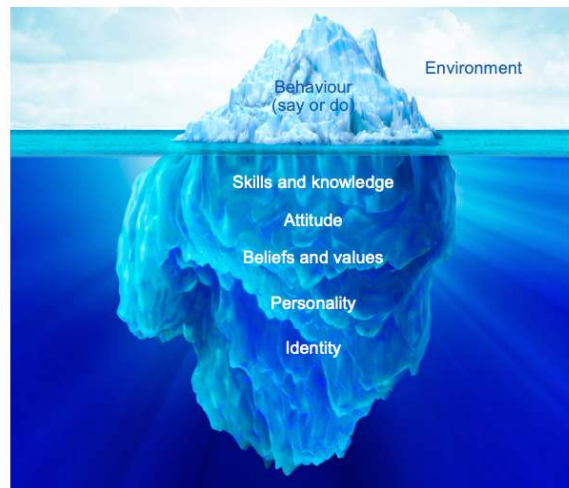
I use the Clarity 4D personal profiling tool to unlock these insights. Based on Jungian psychology, Clarity 4D generates personality insights based on our preferences for gathering information (sensing / intuition), making decisions (thinking / feeling) and responding to situations (introversion / extraversion). These preferences are then translated into four 'colour energies'.

It's important to note, humans are complex, and we don't fit neatly into little boxes. In reality, you will have some preference for each of these styles and will adapt your style to suit different circumstances. That said, most of us have a strong preference for two colour energies, which reflects our default mode and where we feel most comfortable.

People who have the same colour energy preferences are likely to feel like familiar friends the moment they meet. That's because their automatic brain processes their common styles as safe and likeable (aka affinity bias). People with opposite colour energy preferences are more likely to be perceived as a threat or annoyance. Perception means there are generally two sides to any personality trait. Decisive / insensitive, factual / cold, animated / self-promoting, caring / submissive are all examples of how two different people can perceive the same personality.

Being conscious about how your personality might be perceived and how you might be perceiving others can avoid a whole lot of misunderstandings and upset. Taking it one step further and adapting our style to suit the preferences of others can dramatically improve our ability to influence.

**Your personality impacts your behaviour**



# What are your personality preferences?



Reflecting on the four quadrants above, what are your two most and two least dominant 'colour energies' (blue, red, yellow and green).

1

2

3

4

How do these personality preferences come alive at work? What role do they play in your success?

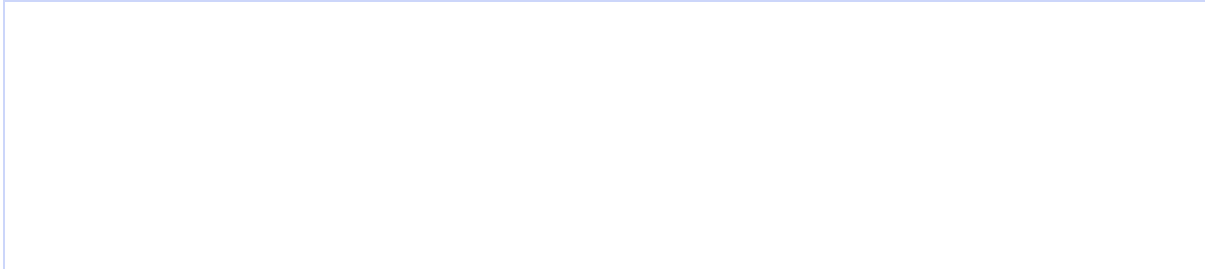
# Discovering shadows

Now let's have some fun with the power of perception and the nature of shadows. The lists below capture the two sides of the four colour energy personality types. Take a moment to have a chuckle at your flip side traits (there will be some that really resonate) and then mark which ones most relate.

 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Factual</li> <li>Careful</li> <li>Quiet</li> <li>Conventional</li> <li>Organised</li> <li>Deep thinking</li> <li>Logical</li> <li>Self-disciplined</li> <li>Meticulous</li> <li>Reflective</li> <li>Analytical</li> <li>Conscientious</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Preoccupied</li> <li>Remote</li> <li>Over-exacting</li> <li>Unenthusiastic</li> <li>Distant</li> <li>Rigid</li> <li>Conformist</li> <li>Sceptical</li> <li>Overcritical</li> <li>Cold</li> <li>Unbelieving</li> <li>Resistant</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Decisive</li> <li>Proactive</li> <li>Passionate</li> <li>Focused</li> <li>Assured</li> <li>Direct</li> <li>Bold</li> <li>Achieving</li> <li>Brave</li> <li>Persistent</li> <li>Striving</li> <li>Forthright</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Insensitive</li> <li>Arrogant</li> <li>Impatient</li> <li>Self-opinionated</li> <li>Controlling</li> <li>Domineering</li> <li>Aggressive</li> <li>Hot-tempered</li> <li>Relentless</li> <li>Inconsiderate</li> <li>Reckless</li> <li>Dismissive</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>
 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Loyal</li> <li>Thoughtful</li> <li>Supportive</li> <li>Empathetic</li> <li>Attentive</li> <li>Tactful</li> <li>Steady</li> <li>Unassuming</li> <li>Committed</li> <li>Caring</li> <li>Appreciative</li> <li>Understanding</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Obstinate</li> <li>Slow</li> <li>Undecided</li> <li>Stubborn</li> <li>Submissive</li> <li>Morose</li> <li>Disapproving</li> <li>Unforgiving</li> <li>Resentful</li> <li>Passive</li> <li>Hesitant</li> <li>Listless</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Animated</li> <li>Lively</li> <li>Engaging</li> <li>Optimistic</li> <li>Entertaining</li> <li>Articulate</li> <li>Expressive</li> <li>Energetic</li> <li>Creative</li> <li>Persuasive</li> <li>Friendly</li> <li>Spirited</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>	 <p>Clarity4D clear colourful communication</p> <ul style="list-style-type: none"> <li>Exaggerating</li> <li>Chaotic</li> <li>Self-promoting</li> <li>Unrestrained</li> <li>Impulsive</li> <li>Selfish</li> <li>Shallow</li> <li>Frantic</li> <li>Showy</li> <li>Noisy</li> <li>Careless</li> <li>Tactless</li> </ul> <p>© 2007 Clarity4D   www.clarity4d.com</p>

I encourage you to think about your flip side traits as strengths overplayed. It's not bad or wrong, just the full human expression of who you are. That said, these shadows can impact our ability to connect with and influence others if we hide or shun them.

Have a think about what these strengths and shadows mean for how you might need to adapt to improve your personal effectiveness?





# The Line

How you go below the line and what you do when you're there reveals wonderful insights into how you show up for others when triggered and/or under pressure. What it takes to shift above the line highlights adaptive challenges.

## Step 1

The first step of seeing how you go below the line is to pick any relationship issue or persistent complaint. Preferably it is one that you have struggled with for some time and has "juice" for you. Name the person and your core complaint

My biggest complaint is about \_\_\_\_\_ is \_\_\_\_\_.  
(name)

Example:

My biggest complaint about Sarah is that she doesn't listen to me

My biggest complaint about the sales team is they don't value our work

My biggest complaint about leadership is they don't respond to our feedback

My biggest complaint about customers is they're rude and ungrateful

## Step 2

As you think about this issue, "Where are you?" Above the line \_\_\_\_ or below the line \_\_\_\_?

## Step 3

What do you do when you go below the line on this issue?

- I gossip / vent with others
- I withdraw and / or avoid the person or avoid confronting the issue
- I blame this person / believe they are wrong and I am right
- I become critical
- I become angry / become aggressive / anxious

Other:

## Step 4

Acknowledge the payoffs that you are getting from keeping this issue going below the line.

- I get to avoid my core feelings, especially the feelings of (fear, sadness, anger)
- I get to stay connected
- I get enlivened by adrenaline
- I get to stay in the familiar and avoid the unknown
- It gives me something to do or a compelling story to tell
- I get to avoid taking responsibility for my issues
- I get to be right about the following:

## Step 5

Can you accept yourself for being just where you are? Yes \_\_\_\_\_ No \_\_\_\_\_

## Step 6

Are you willing to shift? Ask yourself these willingness questions to find out. Your learning moment comes from the questions you answer 'no' and the questions that are hard to answer 'yes'. These will reveal how you go below the line.

Are you willing to end all blame regarding this issue?	Yes_____	No_____
Are you willing to let go of being right about?	Yes_____	No_____
Are you willing to feel your (sadness, anger, fear) related to this issue?	Yes_____	No_____
Are you willing to see that the opposite of your story is as true?	Yes_____	No_____
Are you willing to reveal anything you're withholding about this issue?	Yes_____	No_____
Are you willing to stop all gossip about this issue?	Yes_____	No_____
Are you willing to clean up all broken agreements related to this issue?	Yes_____	No_____
Are you willing to shift from entitlement to appreciation about this issue?	Yes_____	No_____
Are you willing to let go of taking this issue seriously?	Yes_____	No_____

Based on your responses above, are you willing to shift? (any No above is a No)

Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, move on to step 6 and 7. For most of us, getting above the line on relationship conflict takes further work. Head to the deep dive section to keep going, then revisit if you're willing to shift.

## Step 6

Based on your current commitment in this moment regarding this issue, complete this sentence.

Today is \_\_\_\_\_ and I am committed \_\_\_\_\_

## Step 7

If you are willing to shift, "How will you shift?" What is one action step you can take and by when will you take it?

My measurable action is:

\_\_\_\_\_

I will do it by: \_\_\_\_\_ at \_\_\_\_\_

(Date)

(Time)

# Drama triangles

Almost all interpersonal conflict arises out of drama where well-worn scripts of victims, villains and heroes drag us below the line. When we're stuck in drama we're blaming others and committed to being right.

Watch this [video](#) to learn more about the drama triangle and then map out your drama triangle for this relationship issue / persistent complaint. I encourage you to be as dramatic as you can be and refer to the drama cards to assess what roles your playing in this drama.

This deep dive exercise helps us say 'yes' to a) and b) of the willingness questions.

The **victim** in my drama is

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The persona I'm / they're taking on is

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I'm / they're commonly saying

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---

I / they look out for

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---

The **villain** in my drama is

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---

The persona I'm / they're taking on is

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---

I'm / they're commonly saying

---

---

I / they look out for

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The **hero** in my drama is

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---

The persona I'm / they're taking on is

---

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I'm / they're commonly saying

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---

I / they look out for

---

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# Teaching your drama class

In the exercise above, you've mapped out your drama triangle and you might have started to see your role in the relationship conflict you're experiencing. Now we're going to bring that to life with a fun exercise by pretending you have been hired by a university to teach a class on how to create the EXACT same issue that you are having in your life.

Your students need you to give them very specific instructions that they can follow to create the outcome you are currently experiencing. Using the questions below as prompts, define the five or so steps they would need to take to recreate your issue in their life.

Questions to answer to help you create your drama:

- 
- |   |   |
|---|---|
| What actions do you take or not take?                             | What "shoulds" do you have to believe?                                    |
| What do you have to believe about yourself, others and the world? | To what do you feel entitled?   |
| What feelings do you repress/conceal?                             | What do you believe you do not have enough of?                            |
| What are you trying to control that is NOT in your control?       | What either/or story do you have to hold about this issue?                |
| What do you have to be right about?                               | Who do you blame?   |
| What do you withhold and from whom?                               | How do you fix it, but only temporarily?                                  |
| What do you not face?   | Who do you have to be better/less than?                                   |
| How do you numb yourself from the discomfort?                     | What agreements do you have to make and/or break with yourself or others? |
|   | What do you have to be afraid of?   |
- 

Course title

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Example: How to have a dissatisfying relationship with your boss 101

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# Persona interview

Chose a persona that you think is running the issue. Take on the posture, voice and attitude of this persona, and give it a name. Then answer the following:

[Persona name], What is the most important thing to you?

[Persona name], What are you most proud of in how you served (person's name) in his/her life?

[Persona name], When did you make your first appearance in (person's name)'s life?

[Persona name], who did you learn your style from?

[Persona name], what are you most afraid of?

[Persona name], in your heart of hearts, what do you MOST want?

[Persona name], What is your gift?

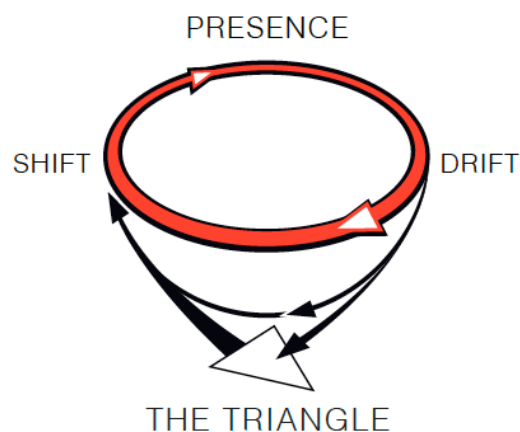
## Shifting from drama to presence

Presence is a state of conscious awareness, fuelled by non-judgemental curiosity instead of blame and righteousness. Presence is interested in understanding the dynamics at play behind events, and your own role in them. When in presence, the veil of drama is lifted.

Presence welcomes all authentic feelings and is possible at any time.

You will drift from presence to the drama triangle routinely. The invitation is to see that drift and choose to shift.

To move into presence we need to first see the role we're playing in our drama triangle. Referring to your drama cards, map out the [drama triangle](#) that underpins your current behaviours. Remember, we usually play all three roles in the drama triangle and so we need to shift in each role first, before we can support others to shift.



### From victim to creator

My victim personas are:

Creators are empowered to bring forth the life they want. They claim personal power to create a desired outcome. A creator is vision-focused and passion-motivated. Creators get curious as they take responsibility for everything that happens in their life. Creator is the foundation of all three roles (Coach, Challenger, Creator) because they are all committed to personal empowerment and taking 100% responsibility.

What can you take 100% responsibility for with respect to this drama or issue?

What fears do you need to face? What other feelings need to be fully faced?

What possibilities could you create from this drama or issue?

What is the opposite of your story? What new perspective could you become curious about?

What is this situation here to teach you?



## From villain to challenger

My villain personas are:

Challengers provoke others to act; they call forth something new to be learned or experienced. A Challenger might be an event, situation, or person – any catalyst for learning, change and growth. Challengers have the courage to be with discomfort-theirs and others. They use confrontation and compassion to help Creators wake up and take action. Challengers provide authentic unarguable feedback so that people in the triangle can locate themselves as being below the line and in drama. The Challenger notices the person's receptivity to feedback and if there is no receptivity the challenger stops giving feedback. The Challenger also invites the Victim into responsibility by supporting them to clarify whether they are willing to shift into Creator or choose rather to stay in Victim.

What authentic, unarguable feedback conversation do you need to have?

What loving pressure could you provide?

Who or what do you need to stop making wrong / bad?

What can you take 100% responsibility for?

What anger can you authentically feel to clarify your desire and take action?

How else can you support victims to become creators?

## From hero to coach

My hero personas are:

Coaches provide encouragement and invites self-empowerment; facilitate progress. They trust that life is providing learning opportunities that do not need to be controlled or resisted. Coaches know that everyone has their own power and ability to create. A Coach supports a Creator in taking ownership for his or her life's circumstances. Coaches facilitate, guide and encourage, while leaving the power with the person creating. A Coach is focused on present learning and future creation. Coaches let other people own their outcomes. When needed, a Coach can consciously shift into the role of a constructive Challenger.

How can you support others in claiming 100% responsibility?

What stories do you need to drop about others being 'less than' / needing fixing?

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What value can you appreciate about another's pain and suffering?

What questions can you ask? How can you listen deeply, without a filter (ie attitude or bias)?

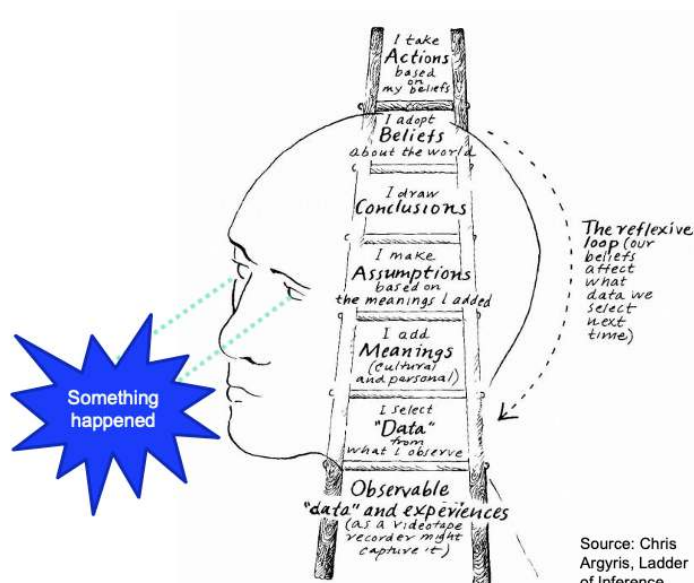
How can you shift into the role of constructive challenger as part of coaching others?

Shifting to presence to achieve your adaptive challenge

How can these shift moves support you to make progress with your adaptive challenge?

# The power of stories

Believing our stories are true is one of the most common ways we go below the line, stay stuck in drama and impede our development. Indeed, it's the source of most human suffering. That's a big call! Let me explain...



Neuroscientists and developmental psychologists have shown that the human brain adopts beliefs or stories about the world by applying their personal and cultural meanings to the data they select from what's observed. We then take action and tend to collect more data that confirms our beliefs. This is how confirmation bias occurs.

Suffering and conflict occurs when the stories we tell ourselves are critical and negative – about ourselves, others or our environment. The tighter we hold onto those stories, the more suffering and conflict created.

You might be asking: What if those stories are objectively or morally true? Like people

shouldn't be racist? Or bullying is bad? Or that manager really is incompetent (insert list of evidence)?

The problem arises when we tightly hold onto these beliefs and so engage with that person or issue from a place of being right, setting ourselves up for a war that no-one wins. In the process we shut down our ability to learn and be curious, and achieve a win for all outcomes. Our ability to influence is diminished.

If we have these conversations from above the line, we invite a shared understanding that is more likely to create outcomes where everyone learns and grows.

# Fact vs story

Let's apply this concept now to the issue you're working with by following the steps below.

**Step 1** Define a recurring issue that you are willing to shift

**Step 2** Write down all the facts related to the issue. Facts are what a video camera would record (without music and interpretation of tone)

**Step 3** Write down all the stories you have about the facts. These are what you make up about the facts. Look for 'shoulds', judgments, interpretations and emotions.

The issue is \_\_\_\_\_

## Facts

What a video camera records

## Stories

What you make up about the facts

The next step follows [The Work of Byron Katie](#). Katie (as she is known), encourages a meditative approach where we reflect on a limiting belief we're currently holding onto.

Pick one of the stories above that resonates the most and write it down here:

Close your eyes, take a few deep breaths and contemplate that statement. Then ask yourself four questions:

Is it true?

Can you absolutely know it's true?

How do you react, what happens when you believe that thought?

Who would you be if I could erase that thought from your mind?

Once you connect with how much being right is costing you, it becomes easier to see how a whole range of opposites might be equally as true, not necessarily more true, but equally as true. This is where the turnaround comes in. Here's how turnarounds work:

**Current belief: Jill is unkind to me. Alternate stories: I am unkind to Jill. Jill is kind to me. I am unkind to me.**

Write down all of the opposites of your story and any evidence you can find that supports these alternate views. There won't always be four opposites and sometimes there may be more than four.

**Alternate stories**

**Evidence of alternate stories**

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This exercise helps us let go of limiting beliefs by constructing a range of new ones, which in turn dissolves our commitment to being right, helping us to shift above the line.

# SCARF

Your trust and threat systems reveal fascinating insights into how to bring your best self to work and bring out the best in others.

Neuroleadership expert Dr David Rock developed his 2008 SCARF model as a tool to help leaders and teams work with the brain to influence and collaborate more effectively. You can use the model to explore your own threat and trust systems, and how they create reactive tendencies that can undermine our effectiveness.

System insights	How this system can impact how we show up when under pressure	Cost	Ideas for people leaders to inspire trust	Ideas for team members to inspire trust	How does this system impact you? How could you better work this system?
<p><b>Status – our relative importance to others.</b></p> <p>We're tribal creatures; status equals survival.</p>	<p>We blame and criticise others.</p> <p>We become defensive to feedback.</p>	<p>Perception of lower status reduces cognitive capability.</p> <p>Blame and criticism erodes trust in teams.</p> <p>Defensiveness impairs ability to grow and adapt</p>	<p>Seek and give positive feedback.</p> <p>Create a culture of gratitude and appreciation for yourself and others.</p> <p>Focus on the most generous interpretation of others.</p>	<p>Being more open to / asking for feedback.</p> <p>Celebrating achievements.</p>	

System insights	How this system can impact how we show up when under pressure	Cost	Ideas for people leaders to inspire trust	Ideas for team members to inspire trust	How does this system impact you? How could you better work this system?
<p><b>Certainty – our ability to predict the future.</b></p> <p>The act of creating certainty is rewarding.</p> <p>Even bad certainty is better than uncertainty!</p>	<p>We resist change, seek predictability and stay in our comfort zones.</p>	<p>Progress and growth is hampered.</p>	<p>Provide more direction to the team.</p> <p>Make plans and /or envisage yourself handling difficult situations.</p>	<p>Be more open to change.</p> <p>Seek out ways to do things differently.</p> <p>Make plans and /or envisage yourself handling difficult situations.</p>	
<p><b>Autonomy – our sense of control over events.</b></p> <p>Even a small choice or anticipating making a choice is rewarding.</p>	<p>We can be controlling of others to promote our own sense of control, which in turn triggers other's autonomy system.</p>	<p>Employees who don't feel a sense of autonomy are more likely to be disengagement, disempowered and more likely to leave.</p>	<p>Provide direction on the end goal, less specificity on how it must be achieved.</p>	<p>Focus on things you can control.</p>	



System insights	How this system can impact how we show up when under pressure	Cost	Ideas for people leaders to inspire trust	Ideas for team members to inspire trust	How does this system impact you? How could you better work this system?
<p><b>Relatedness – how safe we feel with others.</b></p> <p>Lack of safe social interactions generates threat response.</p> <p>Small groups and personal interactions promote trust.</p>	<p>Our desire for relatedness can be a barrier for having important feedback conversations with others.</p> <p>Relatedness can fuel gossip and venting.</p> <p>Blame and criticism can undermine relatedness</p>	<p>Employees who don't feel safe with the people they work with are less likely to speak up and contribute.</p>	<p>Connect meaningfully with your team.</p> <p>Lean into difficult conversations by focusing on the value of feedback for others to grow.</p>	<p>Spend more time connecting with others.</p>	
<p><b>Fairness – how fair we perceive the exchanges between people to be.</b></p> <p>Fair exchanges are intrinsically rewarding. Unfairness at work affects mental and physical health.</p>	<p>Perceptions of unfairness dampens morale and productivity, and can trigger righteousness.</p>	<p>Righteousness limits our perception.</p> <p>Low morale and productivity hampers team performance.</p>	<p>Build fair and transparent process processes.</p>	<p>Become curious about how perceived unfairness helps you feel right.</p>	

# Immunity to Change

Change is hard and most of us fail despite best efforts to shift behaviours, even when the stakes are high.

Determined to change this common reality, behavioural psychologists Kegan and Lahey, developed a framework that helps learners uncover the deeply embedded barriers to change before mapping new ways of being in a format that encourages and enables feedback and shared discovery.

I've seen this tool dissolve learned behaviours from childhood and in the process transform people's life. I incorporate it throughout my programs, ensuring every participant has a detailed understanding of their biggest development opportunities, what gets in the way of making change and what progress looks like. Participants share the tool with their colleagues, creating a culture of accountability and support.

Below I've mapped out the Immunity to Change process and illustrated each step with two different real-life examples from my personal and client experience. I've infused some steps with additional insights from The Conscious Leadership Group and Byron Katie. A blank template is provided at the end of this section.

## Mapping your Immunity to Change X-Ray

### Step 1:

The first step is to identify a behavioural change you want to make. I like to call this a personal growth goal. The best change commitments are those that will make the biggest difference in your work and life. In other words, there's plenty of skin in the game. If applying this in a work context, I recommend getting feedback on the commitment you're looking to make. That way you can test what change commitment will have the biggest impact on your effectiveness. Write this as a simple statement such as:

*I commit to asking more open questions of others, listening more and speaking less in meetings and in other important conversations.*

*I commit to asking for help sooner if I don't know the answer.*

Then capture what difference this change would make to you and others in your team or life. Be specific. This is another great opportunity for feedback – ask your colleagues and the people in your life what difference it would make to them if you were to achieve this commitment goal. This might look like:

*More curious questioning will help all of us explore new possibilities, I will help people feel safe and comfortable sharing their ideas, everyone will gain from hearing other people's perspectives and I will feel less anxious about needing to dominate the conversation.*

*I will be able to finish my work sooner and take on more responsibilities and will feel less anxious about not having the answer.*

## Step 2

In step 2, we identify the specific behaviours that work against your goal and what they are costing you. Meaning, what are you currently doing or saying, or not doing and saying that you want to change?

*Currently I am dominating conversations, talking over people and thinking about what I can say next to prove by point rather than really listening to the other person's perspective. This makes other people frustrated and like they aren't being heard or valued. As a result, they trust me less and our relationship is worse off for it. Plus our ideas aren't as good as they would be if we genuinely collaborated.*

*Currently I am committed to being right by spending hours working out problems so that everything I do is perfectly error free. I don't ask my team for help even though that may know the answer. This costs me time, makes me feel stressed and means I don't have as much time to help other people in the team.*

## Step 3

This is where it gets juicy and a bit confronting. In step 4 we reveal what we're currently committed to, which is fuelled by the payoff we get from our current behaviours and what we're concerned about losing if we change. This insight reveals how we protect ourselves from perceived threats to our identity, security, approval or control. In other words, it's how we go below the line. By declaring these current behaviours, we take radical responsibility for our [hidden commitments](#), which is essential for change to occur.

Look for how we play out dramas, why we gossip and blame, or why we need to be right. Consider payoffs like being enlivened by the conflict, drama or story, avoiding negative feelings, staying in the familiar and avoiding the unknown, avoiding responsibility, and being right.

If this insight doesn't hurt a bit, then you probably haven't cracked it. To continue with the examples above:

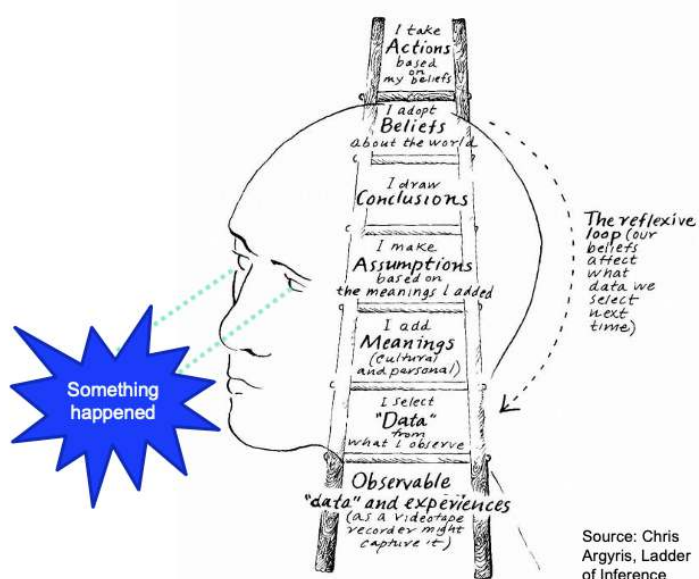
*I'm worried that if I don't step in the team will waste time and won't come up with the best ideas, and that will make me look bad. The payoff I get is being right and always having the answer. I am currently committed to being right (especially more right and better than others), having the best ideas and proving that I'm more valuable than other people in the team.*

*I'm concerned I'll waste people's time and they will think less of me if I ask them for help. The payoff I get is avoiding the fear of disappointing others. Currently I'm committed to pleasing others and protecting them from having to help me.*

## Step 4

This step is about identifying the assumptions that underpin our hidden competing commitments. Everyone has deeply engrained beliefs that we've formed over a lifetime that underpin our current behaviours. When we tightly hold onto these beliefs and believe them to be true, it makes it almost impossible to achieve lasting change.

The ladder of inference model developed by Chris Argyris explains how we form beliefs. I like to think of these as stories we make up about what we observe. The stories we tell ourselves are incredibly powerful sources of suffering and joy. The key is to see them as just that – stories we make up and can re-write.



Here's how that played out for our two examples.

*I assume the team won't make the best decision or can't come up with good ideas without my direct input. I assume I need to be heard (loudly and often) to be recognised as a key contributor. I need to make my point on all points and several times to be recognised as the smartest person in the room.*

*I've got to be right and have the answer to protect people.*

## Step 5

At this point we can see the underlying beliefs we hold and stories we've told ourselves that need to be challenged and re-written to achieve the behavioural shift required. If these beliefs are deeply engrained, they need to be further investigated and tested before we can loosen their grip on us. Keagan and Lahey offer provide some great questions for you to explore that more deeply and ways to test alternative assumptions.

	a)	b)
What's the assumption that underpins your concerns?	I assume the team won't make the best decision or can't come up with good ideas without my direct input. I assume I need to be heard (loudly and often) to be recognised as a key contributor. I need to make my point on all points and several times to be recognised as the smartest person in the room	I've need to protect people by always having the answer

When does it seem valid? When might it not be valid? When is it most likely to drive your behaviour? ie what are your triggers?	This feels most valid when the stakes are high or the team seems to not have the right experience or expertise to deliver.  It's not valid all other times.	Now that I reflect on it, it's never really valid.
How does this connect to your identity? When did it start?	From a young girl, my family told me I was the smartest in the family. Loud lively debate was encouraged and being an active participant gave me recognition and affection from my family.	When I was young my father was very controlling and aggressive and as the oldest child this was particularly targeted at me when I made mistakes. I felt I needed to be right to protect my younger sister.
How might you test it in a safe, small scale way in the near term? What data are you looking for to test your assumption?	I can practice being the last person to speak in meetings or not speaking at all and see how it impacts discussion. I can then ask the team for feedback on what difference it makes.	I will try to find the answer for 30 minutes and will then ask for help if I can't work it out myself. I will see what time it saves me.
How might you redefine your identity of assumptions to capture your new commitments?	I have shifted my view of what the smartest person in the room looks like and can see it's not the loudest or most vocal. Indeed, it's the one that let's others shine!	Inviting help from others is best for the team and that's how I can contribute best to this team.

[The Work by Byron Katie](#) is another powerful tool to set ourselves free from limiting beliefs. In this work, Katie (as she is known), encourages a more meditative approach where we reflect on a limiting belief we're currently holding onto and ask ourselves four questions:

Is it true?

Can you absolutely know it's true?

How do you react, what happens when you believe that thought?

Who would you be if I could erase that thought from your mind?

Once you connect with how much being right is costing you, it comes easier to see how a whole range of opposites might be equally as true, which is where the turnaround comes in.

Here's how these turnarounds worked:

<p>a)</p> <p>Current belief: I need to dominate for the team to make the best decision</p> <p>Alternate stories:</p> <p>I don't need to dominate for the team to make the best decision</p> <p>If I dominate the team won't make the best decisions</p> <p>If I dominate, I won't make the best decision</p>	<p>b)</p> <p>Current belief: I need to protect people by always having the answer and being right</p> <p>Alternate stories:</p> <p>I don't need to protect people by always having the answer and being right</p> <p>I don't protect people by always having the answer and being right</p> <p>I expose people by always having the answer and being right</p>
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From there, we can capture evidence to support each of these alternative views. This exercise helps us let go of limiting beliefs by constructing a range of new ones, which in turn dissolves our original story.

## Step 6

In the final step we map what progress looks like over time:

<b>Commitment / growth goal</b>	<b>First steps forward</b> What will you do to start making progress? What support can you ask from others?	<b>Significant progress</b> What will others notice? How will they feel? What will you feel?	<b>Success</b> How will you know you're no longer hooked by your immunity to change?
I commit to asking more open questions of others, listening more and speaking less in meetings and in other important conversations.	I will share my commitment with others and invite feedback on my progress.  I will set a reminder 'speak last' before key meetings.	Others will notice a more open, free-flowing discussion in team meetings. They will feel their ideas are valued. I will feel pleased that I'm making progress.	I will feel relaxed speaking last in meetings.
I commit to asking for help sooner if I don't know the answer.	I will set myself a 30 minute time limited to work out problems before asking for help.	Others will notice me asking for their help and offering to help with other activities due to have more time.	I will feel good about asking questions.

## Learning more

This is a great [article](#) by Lisa Lahey on their research and model.

This [animation](#) is a little slow and daggy but covers the core aspects of the model for those who like visualisations. For the complete picture, read the [book](#).

# Template: Immunity to Change X-Ray

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## My adaptive challenge

*What growth goal can you set that will have the most significant impact on you and the team?*

## Behaviours that work against my goal

*What are you currently doing /saying? Is what needs to change?*

## Hidden commitments

*Worry box: What payoff do you get from your current behaviour? What might you lose if you change?*

## Big assumptions

*What are the big assumptions underpinning your concerns? What stories are you telling yourself to justify your hidden commitments?*

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*What will you and the team gain from you achieving this goal?*

*What are your current behaviours costing you and your team?*

*Therefore, what are your competing commitments? What do you gain from not changing? This is NOT your new commitment but rather your current commitment.*

Currently, I'm actually committed to...

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## Busting assumptions

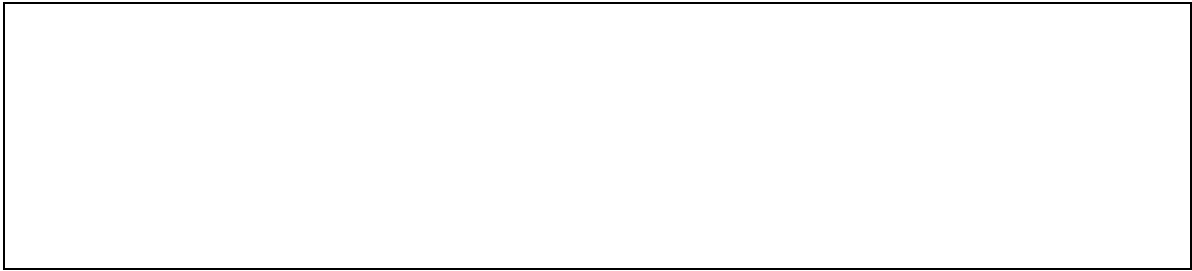
What's the assumption or story that underpins your concerns?

When is it valid? When is it not valid? When is it most likely to drive your behaviour? ie what are your triggers?

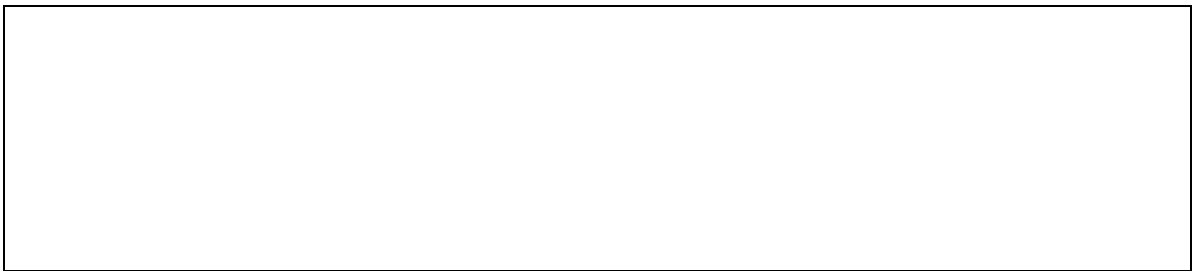
How does this connect to your identity? When did it start?

What is the opposite of this story? Is this as true as your current story? What evidence do you have or could you collect to validate the opposite of your story?

How do you feel when you believe the opposite story?



How might you redefine your identity and assumptions to capture your new commitments? Do The Work by Bryon Katie to explore if the opposite is as true as your current belief.



## Progress map

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Commitment / growth goal	First steps forward	Significant progress	Success
	<i>What will you do to start making progress? What support can you ask from others?</i>	<i>What will others notice? How will they feel? What will you feel?</i>	<i>How will you know you're no longer hooked by your immunity to change?</i>

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# Thank you

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