

Erica Rizziato

# Towards a humanism for organizations

Horizontal leadership and consciousness

Contributions by Erika Nemmo

Presentation by Federico Faggin  
Introduction by Filippo Abramo





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Special thanks to Prof. Alfredo Mazzocchi, who over the years has been dedicating his life to international cultural connections. Deeply passionate about the topics covered in the book, here he is donating the English translation, with professionalism and generosity.

The image on the cover is by the Author and represents the development of consciousness in organisational contexts.



This book was published in the Italian version with Francoangeli, in the AIF (Associazione Italiana Formatori) series. E. Rizziato (2020) "Verso un umanesimo della vita organizzativa: generare sviluppo nella Complessità con la leadership orizzontale".

The English edition, which comes out about four years after the Italian one, offers, in addition to the new presentation and introduction, more suitable for an international audience, some updates to the reference documents and integration on the evolution of a local development project in chapter 7. Finally, it includes in the section titled "For Further reading", written by Antonia chiara Scardicchio, the reflections of an expert from outside the development work on the proposed methodology, who observed its evolution for six years, evaluating it in the context of training for change, in the academic and professional settings.



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*To my children Elisa and Alessandro and to the young people who, like them, are entering a world of work full of new challenges, in the hope that the proposals expressed in this book can give a contribution to the development of their social individuality.*

*To my IMO colleagues with gratitude for the fertility of our long interactions.*



*“Look, observe. The most important and beautiful thing in the world is this: that people are not always the same, that are not yet defined but are always changing. In the choir or out of the choir. The greatest truth. This is what life has taught me. This makes me immensely happy.”*

(João Guimarães Rosa)

*“Can industry give itself ends? Are these ends only in the profit index, or is there not an ideal plot, a vocation even in the life of a factory?”*

(Adriano Olivetti)

The book talks about this possible vocation, which is based on ensuring that the social identity of individuals is realised by giving meaning and significance to their work, as a contribution to the development of the community. It will then be possible to generate organisations as places of meaning, modern working communities.

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# Presentation

by Federico Faggin<sup>1</sup>

I met Erica Rizziato during one of my conferences in Italy. We shared the importance of consciousness in the context of organizational development, since her work proposes many of the ideas I have developed in my studies on consciousness, free will, and quantum physics.

In my latest book, *Irreducible: Consciousness, life, computers and human nature*<sup>2</sup>, I argue that consciousness and free will are primary properties of nature that cannot be derived from simpler concepts. This approach can then explain why quantum physics must have the strange properties that have baffled scientists for almost a century. Specifically, the conscious experience has the same properties of quantum information, and the collapse of the wave function has the same properties of a free-will decision<sup>3</sup>.

In this new conception, we are conscious quantum fields with free will, called seities, controlling a physical body as if it were a drone. The relationship between the seity and the body is so intimate and immersive that she ends up identifying with the body.

The body is a quantum and classical structure existing in spacetime that acts like a bridge between the seity and the physical world of macroscopic objects.

The body senses and processes information coming from the physical world and communicates with the seity which transforms that information into qualia, i.e., the sensations and feelings that carry the meaning within its own field. In the opposite direction, the seity transforms the meaning she wishes to communicate to the body into the appropriate symbols for the body to act accordingly.

Therefore we have a semantic world of meaning communicating with a symbolic world. Our true nature exists in the deeper semantic world out of which emerges the symbolic physical world described by physics.

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<sup>1</sup> Federico Faggin is a physicist born and educated in Italy who co-invented and developed the MOS Silicon Gate Technology at Fairchild Semiconductor and designed the world's first microprocessors at Intel. Faggin also co-founded and led Zilog and Synaptics, two highly successful startup companies. At Zilog Faggin designed the Z80-CPU, a third-generation 8-bit microprocessor still in production today. Synaptics developed in 1994 the touchpads and the touchscreens, now used in nearly all mobile devices. In 2011 Faggin created the non-profit Federico and Elvia Faggin Foundation, dedicated to the science of consciousness. In 2022 Giacomo M. D'Ariano and Faggin published the first theory of consciousness and free will. Faggin received the 2009 National Medal of Technology and Innovation from President Barack Obama and the Cavaliere di Gran Croce title from the Italian President Sergio Mattarella in 2019.

<sup>2</sup> Faggin (2022, 2024).

<sup>3</sup> D'Ariano, Faggin (2022).

In this framework the seities are generated by One, the totality of what exists. One knows itself through the self-knowing of the seities who interact with each other and combine into hierarchies. The self-realization of the seities at the personal and collective levels is achieved through different organizations ranging from family, friends, partners, church, school, and so on. The most important of them is what I call productive enterprise, the one in which we spend most of the time during our life because it supports us.

With this background we can now focus our attention on the productive enterprise. This is an organization of human beings that manifests the same material and immaterial aspects common to each individual. Here material and immaterial are the symbolic and semantic aspects of reality discussed earlier. The enterprise's symbolic, material outer world is the world that contains its physical assets and tangible products. The enterprise's semantic, immaterial inner world contains its emotional, mental, and spiritual or unitive aspects.

The goal of a productive enterprise is to bring useful products and/or services to clients while providing material and immaterial "self-fulfillment" to enterprise and employees. While the enterprise's material aspects are obvious, the immaterial aspects are the organizational and technological know-how, the "intellectual property", together with the seldom recognized "spiritual property", consisting in the enterprise's values and culture, and the "emotional property", i.e., the inner emotional climate that inspires and gratifies the employees, when positive.

Notice that the intellectual, emotional, and spiritual aspects of an enterprise constitute its inner world, which is always more than the sum of the inner aspects of its employees. On the other end, the enterprise's outer world is simply the sum of its material components. Only in the immaterial, inner world we find that the whole is always more than the sum of its parts.

An enlightened enterprise, in addition to being self-sustaining and serving its clients, promotes the personal growth of all its employees by creating a social fabric capable of stimulating and satisfying their individual self-realizations at the emotional, mental, and spiritual levels.

I speak also as a practitioner because I spent about 35 years of my life as an entrepreneur. I founded 3 startup companies, of which I have been CEO, and I also led a fourth company as CEO. In my first startup, Zilog, my desire was to create an open culture in which work was fulfilling, unlike the companies in which I previously worked as an employee. I especially disliked the classical "command and control" approach that inevitably leads to a political and competitive environment that often turns into a source of major stress for the employees.

While at Zilog, I created in 1978-79 a semiconductor factory in Idaho in which the workers largely ran the factory. The role of the managers was more that of teachers and consultants than the traditional one. This is an example of what Rizziato calls horizontal leadership which, to work well, requires a lot of attention in the study of the specific socio-technical processes, and much training of the staff. It was not an easy process, but the results we obtained, both in terms of productivity and job satisfaction, were outstanding and long-lasting.

In 1993, at Synaptics, my third startup, we invented the touchpads and touchscreens that changed the way we interface with mobile devices. These inventions led the company to great technological and commercial success. As told in my book, *Silicon: From the invention of the microprocessor to the new science of consciousness*<sup>4</sup>, this invention was made by a small group of us, which I led. We met once a week with the goal of creating a solid-state product to replace the trackballs then used in laptops. Over the course of a couple of months, in a playful atmosphere, we jointly invented the touchpad and the touchscreen. And the impact of touchscreens was even more revolutionary than the touchpads’.

This is an example of group creativity in which the inventor is no longer an individual but the group. As a group we interacted in such an integrated way that later, when it was time to file the various patents, it was difficult to remember who invented what. Not only did we have much fun, but we also created the key products of a company whose market value today is about \$4 billion.

At the personal level, I can say that without experiencing the life of an entrepreneur, I would have never been able to achieve the personal growth and development necessary for the type of work that I enjoy today. It was that environment that led me to the extraordinary experiences of consciousness which I described in my books and led me to the theory of consciousness I briefly described. If consciousness comes first, we truly need to rethink the essence of what makes us human beings. Clearly the materialistic worldview that eliminated the purpose and meaning of the universe must be abandoned.

In this book, Erica Rizziato calls “I” what I call seity. And the “I”, or seity, concurrently operates at the individual level for her own benefit, and at the organizational level for the organization’s benefit. The seities are co-creators of the organization. And the crucial aspect of organizational design and development is how to harmonize and optimize both levels.

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<sup>4</sup> Faggin (2019, 2021).

The principles and approach presented by Rizziato can profoundly transform the concept of work, which today is still shaped by ideas of assembly line and military hierarchical organizations relying on rigid rules, competition, and obedience rather than motivation, fulfillment, responsibility, creativity, flexibility, and a sense of belonging.

The time has come to move beyond outdated concepts in which workers and employees are considered like interchangeable parts of a machine.

I have personally experienced that these new concepts work very well in daily practice, and now there is also a strong theoretical basis to support them. Unfortunately, few have the knowhow to apply them.

Rizziato's work in promoting and explaining the profound connections between personal, organizational, and societal development is particularly useful, relevant, and timely. The winning idea is that by identifying and strengthening the virtuous interactions between individuals, organizations and clients – the first beneficiaries of the company's activity – a corporate autopoiesis can be created that facilitates its evolution while improving client satisfaction and employees' growth and wellbeing.

In this vision, we are entities characterised by free will and consciousness, with a strong need to evolve as social beings and become co-creators of a world in which the holographic and holistic nature of the universe is reflected in the organizations we create.

These organizations are more than the sum of their parts and they generate a systemic and evolutionary development that opens up new creative possibilities, generate material and spiritual wealth, and contribute to creating a better world in which cooperation is lived and practiced for the good of the entire ecosystem.

I wish to Erica Rizziato and her colleagues that IMO, their CNR spin-off company may successfully bring into the world this new framework for rethinking, promoting, and teaching how to humanize organizational life by infusing it with ever-greater individual, social, and spiritual significance.

Los Altos Hills, California, March 13, 2024

# Introduction

by *Filippo Abramo*<sup>1</sup>

The Author defines from the outset that the methodology proposed in the book aims to “combine the development objectives of the organisation with those of people who work in it”. “Vaste programme” someone once said!

This issue is crucial for today’s business, as traditional management has a hard time managing organisations and people with the old methods: the high degree of stress that often characterises managerial work is proof of this.

This reflection derives from my vast experience, both as a manager who has worked for several decades in the most diverse organisations, both Italian and multinational, but also as president of the association of personnel managers, both at the Italian and European level, which has seen me engaged for a long time on issues of organisational and people development.

Despite the need for a change in approach, resistance to change, especially in the Italian context, is still very strong, and it is neither easy nor painless to introduce managerial concepts and practices suited to the current times, which must come to terms not only with management but with the culture and values embodied in organisational contexts. The brilliant and pioneering work carried out in his company by Adriano Olivetti, who was the first to bring human sciences into the factory, still represents a niche legacy and has been wisely taken up in the inspirations of the methodology proposed in the book. Advanced practices can be found in some Northern European countries that have worked on crucial issues, such as organisational flexibility at all levels (agile work, horizontal collaboration without barriers, information sharing), the building of adequate managerial capacities on soft skills (such as communication, listening, empathy and coaching of collaborators), the presence of EDI (Equality, Diversity, Inclusion) policies with a strong focus on so-called “psychological safety”.

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<sup>1</sup> At present, Filippo Abramo is President of Federmanagement, the Federation that groups most of the Italian Management Associations (Aidp, Aicq, Adaci, Adico, Atema, Ailog, Asfor/Apaform, FB). He is the Former President of AIDP (Italian Association for Personnel Management). For two terms, he was the President of EAPM (European Association of People Management), the Federation, founded in 1962 whose members include 34 European countries for a total of 260,000 Human Resource Managers and Professionals, which organises and promotes studies, research and seminars to develop the sector. In this capacity, he represented Europe on the Board of the WFPMA (World Federation of People Management Associations). He has held managerial and general management positions for many years in important Italian and multinational companies (Department Stores, iT, Food, Chemicals, Pharma, R&D, Health, Energy, Automotive, Banking Finance sectors) in the areas of Human Resources, Research & Development, Sales & Marketing. He has also been carrying out continuous training work both in companies and in various Italian and French universities.

Despite this, there are still many challenges open, such as defining a complete framework of new competencies for the future, which is becoming increasingly complex and interconnected and requires the development of a new way of thinking, capable of observing paradigms, both one's own and collective, and transforming them, relating various elements of the context. The book presents a framework of innovative competencies in this sense, which substantiates horizontal leadership, and the methodology described also proposes a concrete path to generate them, both on a personal and organisational level.

I believe that Rizziato's work can greatly help companies to move in a new direction, suited to the challenges of complexity: the validity of the proposed methodology is demonstrated by concrete application examples that are clearly indicated. These show that it has succeeded in responding positively to very precise needs that we can summarise in three categories.

The first is that the needs of people at work today are quite different from those of the past. The old "command and control" system is no longer accepted by the new generations looking for the meaning of things and increasingly asking "why?"

The second concerns the point that the organisational requirements posed by the new business processes arising from digital technologies and artificial intelligence call for a rethinking of how to renew and convey values and meanings.

The third points out that the external context (clients, social media, institutions) that is always impacting businesses poses social, environmental and economic demands that are much more stringent than in the past, as highlighted, for example, by the UN's 2030 Agenda.

Taking for granted the undoubted cultural value and effectiveness of the proposed methodology in responding to current needs, the challenge will be how to succeed in spreading it more and more in the real world of organisations, still full of contradictions between declared visions and those acted upon.

If this endeavour is successful, it will undoubtedly make a major contribution to the development of both the economy of organisations and the well-being of people at work.

We are comforted in this hope by the many positive applications of the methodology in non-profit and public contexts presented in the book. They are characterised by a key step, starting from the renewal of organisational culture at the top by creating what the author calls "horizontal space". In it, the work will be done in ways that differ from the ordinary, gradually



involving the work community, researching the connections between organisational processes, improving the client/beneficiary process and at the same time transforming the constructs of the top-down culture. New competencies are thus generated that enable both behavioural and work process change. Integrating vertical spaces, typical of management with horizontal ones, typical of leadership is precisely the innovation that the methodology proposes, which substantiates its definition as a methodology for horizontal leadership and integrated organisations.

I hope that more and more top and middle management will be willing to accept this challenge of renewal by opening up to an innovative and transformative path of processes, competencies and cultures.

Unfortunately, especially in Italy, also according to Federmanagement and Asfor/Apaform research, there is strong resistance: horizontal leadership may be experienced by more traditional managers as a factor of loss of power, while more attentive managers can perceive its evolutionary aspects for themselves and their collaborators. In any case, even for the most reticent managers, the methodology presented can be a valid opportunity to rethink their own role to survive, thus opening up new spaces of improved work well-being for themselves and the people working with them.

This is a necessary path to overcome the growing discomforts in the world of work, highlighted at the beginning of the book, to cope with which managers are called to become increasingly aware of their social role as citizens, with duties towards their community, internal and external.

It is important to emphasise that horizontal leadership does not only concern managerial roles but has a general value for all employees who, thanks to it, will be able to feel as an active part of a common enterprise, finding motivation and meaning in their work, as key elements of their social identity.

About this, it is relevant to report what has emerged from recent international conferences in the UK of CIPD (Certified Institute for People Development) concerning the importance of “back to human” and of having “decent people in decent structures”, where “decent” is understood in the sense of “for good”, for a return to personal and collective morality.

This book proposes a concrete way forward, pointing out that work must increasingly become a place of meaning and belonging and not just a means to survive.

Milan, Italy, March 15, 2024



# 1 - Why this book

*“The fundamental problem of the age of globalisation is the omnipresence of change. But the problem to be tackled is not so much the change itself, but the change of change, the change of the forms of change.”*

(Mario Ceruti)

*“It is not possible to clearly separate collective existence, ‘alienated’ in organised labour, from the “creative” individual existence to be lived in “liberated time”, since the former produces effects important in the second.”*

(Francesco Novara)

## Foreword

Rethinking of the relationship between the individual and the organisation: from the positivist to the systemic-evolutionary view with the methodology for horizontal leadership and integrated organisations (HOLIO)

This book proposes a methodology for experiencing and developing organisations as places of personal and socio-economic meaning. It responds to the challenge of bringing together, synergistically, the impulse of individuals towards self-realisation with the sustainable and lasting development of organisations and territories.

The methodology, called *Methodology for Horizontal Leadership and Integrated Organisations (HOLIO)*, derives from 17 years of action-research and experimentation within the Italian National Research Council, to identify approaches to change that start from the motivation of people and renew the sense and effectiveness of their work. It can make a very useful contribution to the renewal of workplaces, in terms of a new personal and social ecology, understood as the harmonious integration of self and of the context.

This is increasingly more and more imperative today, given the recurring and growing crises in traditional organisational contexts, which manifest themselves in increasing cases of burnout, malaise and demotivation in the work. These critical issues then lead to the phenomenon of large resignations, quiet quitting and a general crisis of the social system, as we shall see in the following paragraphs.

At the root of the criticality of working life lies the persistence of an “organisational culture” inspired by positivist science, characterised by planning, forecasting and control, when quantum physics has shown that everything is related and that the observer changes what he observes.

The theory of complex systems, in particular the theory of social systems, in its evolutions, has studied and continues to study these relations (Luhman, 2001; Parsons, 1991; Maturana and Varela, 2001; Baetson, 1993, 1984; Von Foster, 1991), which consider as a fundamental element the individual with his mental constructs and implicit epistemologies, through which he observes the context.

The challenge is whether and how he can activate self-observation by becoming conscious of the constructs through which he knows reality.

In this regard, interesting are the recent developments in quantum physics (Faggin 2021, 2024) who postulate the existence of consciousness as a quantum reality endowed with freedom and free will. They are key elements, as we shall see, to trigger forms of development that can restore organisational life.

The HOLIO methodology, which has its foundations in this scientific approach, is characterised by bringing it into the organisational field, considering it to be co-evolving with the personal system.

The organisation is seen as a social system that is both closed and open, according to Morin’s vision, for which organisation is “that which defines a system from different elements, and thus constitutes a unity at the same time as it constitutes a multiplicity”, capable of imposing constraints on the parts, as well as “bringing out qualities that would not exist without such an organisation”. It is an autonomous system of relations but in constant relation with the outside world. It defines its identity, as its *raison d’être*, in serving a client through a product or service.

In the book we will generally speak of the client, but the term has a broader meaning that covers all types of organisations (profit, non-profit, public).

The person is also seen as a system, characterised by the dimensions with which we relate to reality: cognitive, emotional and volitional, guided by a biographical leitmotif, towards the realisation of our own identity.

Organisational health is linked to the fact that personal and organisational identity are connected by an evolutionary synergy driven by a mutual generation of meaning, both subjective and collective.

The HOLIO methodology presented in the book derives from the positive experiments of this dynamic in various types of organisation and project.

It proposes an approach of transformative learning with a constructivist background (Mezirow, 2003), which is contextualised in the tradition of action research and action science<sup>1</sup>, drawing inspiration from recent developments in neurosciences (Siegel, 2001, 2010; Damasio, 1995; Doidge, 2007, Eccles, 1994, 1990; Eccles, Popper, 1981).

The organisation is in turn part of wider social and territorial systems, so the methodology has also been applied to local development. It is characterised by a multidisciplinary approach, combining an analytical, formal, quantitative dimension with a descriptive, qualitative, phenomenological one.

The proposed methodology is the “daughter” of two impulses, whose fundamental assumptions it shares, which have found many similarities in the action-research work: that of Adriano Olivetti in Italy with the developments realised by Francesco Novara, and that of Bernard Lievegoed at an international level with the declinations proposed by Adrian Bekman<sup>2</sup>.

People are enabled to act as leaders for development, in a process in which they will be able to transform organisational processes and renew their mental, emotional and action constructs, which are often the source of recurring criticalities. A guiding element in the reading of the processes to be changed will be the criticality experienced by the client: in exploring the nature of the criticality and experimenting with possible improvements, the individual, with the help of colleagues, can observe their critical constructs and transform them. The common aim of serving the client helps to give body and meaning to the process.

It is thus possible to consider organisations as modern working communities, places of personal and social meaning.

The experiments carried out in the action-research path have shown the

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1 Action research is a type of research suitable for the understanding and transformation of socio-economic contexts. It is based on the assumption that “you cannot know a social reality unless you try to change it”, as Kurt Lewin (1972, 2005), one of the founders, put it. The relationship between the researcher and the subject of the study is inter-subjective, the researcher is no longer just an observer and combines the implementation of mechanisms of action, which directly affect the reality under investigation and intervention, with the acquisition of knowledge, using quantitative and qualitative methodologies. It links the analytical and quantitative approach with the interactive and qualitative one. The methodological rigour is given by the alternation between action and reflection. For further discussion, see Rizziato (2010a, 2014), Reason, Bradbury (2001, 2008, 2015), French, Bell (1998). The action science proposed by Argyris, Schon (1978) derives from action research and focuses on the composition between the tacit and the explicit, making individuals critically recognise the discrepancy between declared principles (exposed theories) and those experienced in practice (theories in use). It, therefore, promotes knowledge from experience while designing the organisation and governing its development. For further details on the action-research process, see section 1.1.

2 Novara (1996, 1998, 2008), Novara et al. (2005); Bekman (2007, 2010, 2014, 2017, 2018), About the story of Adriano Olivetti company in english, Cadeddu (2014), <https://het-imo.net/it/missione-parole-chiave/>; <https://www.youtube.com/watch?v=RbjMSBETyGY>; <https://www.facebook.com/watch/?v=7090653430960356>;

effectiveness of observing the organisation's criticalities from the client's point of view and at the same time the "glasses" with which they are being observed. This makes it possible to overcome the limitations of planned change which reduce organisational complexity.

The approach to the development of the HOLIO methodology is exploratory and experimental, as the only one possible in the field of complexity, and will focus on action, rhythmic and generative. The person is thus made responsible as an active part of the system: he/she is not considered a "resource", like others, thus appearing de-subjectivised. On the contrary, they are called upon to be active as individualities. Generativity is given by the alternation of steps of organisational development and steps of personal development, to be realised in the path of change, exercising specific skills, as will be described below.

At the end of the pathway proposed by the methodology, new processes and competencies will be generated which are suitable for moving in complex environments: they have been defined as **competencies for systemic-evolutionary development** at the basis for a new type of leadership, **horizontal leadership**.

It has a transformative value on two totally interconnected levels:

- *organisational*, as it allows to connect the needs of clients with a renewal of work processes, helping to develop the organisational identity with the working community;
- *personal*, as it allows one to be active in overcoming the criticalities caused by behavioural spontaneity, thanks to the reading of one's areas of development in the difficulties experienced in the work processes, moving towards personal self-realisation.

Horizontal leadership is therefore not characterised by leading people, but by leading oneself and processes, in which the individuals involved can act responsibly towards a common goal.

The underlying competencies that are generated with the HOLIO methodology enable systemic-evolutionary thinking, perceiving and acting, enabling forms of social creativity.

The proposed path leads to an organisation that can integrate the social system, i.e. the horizontal dimension of collaboration, guided by the processes of interaction with the client, with the technical-economic one, i.e. the vertical dimension, characterised by the definition of objectives and the evaluation of results.

This is why it has been called an **integrated organisation**. It represents an "adult" form of organisation in which those who work in it tend to act

responsibly with a view to the common good: personal, organisational and social.

From the work carried out during the long period of experimental activity leading to the HOLIO methodology, it emerged that when people are asked to contribute to the development of the organisation and have adequate tools and contexts to explore their areas of improvement, then the perception of their own social identity and thus personality is strengthened, opening up spaces for creative contributions, which reinvigorate the sense of work and collaboration.

It has also become clear that only by enhancing human distinctiveness, characterised by unconventional creativity and above all by the fundamental dimension of self-awareness and the sense of what is positively built with and for others, will it be possible to generate organisations as fully human creations. They will be characterised by a continuous striving for quality and sustainability both in the products/services they offer to society and in the way they are implemented, resulting in significant improvements in economic flows.

Given the challenges posed by artificial intelligence and the augmented reality it proposes, we must respond with an “augmented human reality” that enhances these features.

The path is challenging, but not impossible, as demonstrated by the many success stories that have been built up over the years.

In this sense, the HOLIO methodology proposes a “humanism in organisational life” that goes far beyond the mere involvement of people: it is a matter of activating them in seeing work as a field of self-development, a “mirror” to see how to generate their own identity, in connection with the purpose of collective work.

The methodology will be explained in the book in its basic assumptions and the application part with many examples and concrete cases.

In the following paragraphs of the chapter, a summary of the action-research process underlying the methodology and the critical issues to which it intends to respond are presented.

*Chapter 2* defines the theoretical assumptions of the methodology: the vision of the person and the organisation as two systemic and complex realities, in continuous synergic evolution and the characteristics of their co-generativity.

*Chapter 3* opens the applicative description of the HOLIO methodology: the creation of a “horizontal space” (development infrastructure) to foster

systemic connections in organisations, between processes, according to the final beneficiary and the definition of a cyclic path (called TRASE - Systemic-Evolutionary Training) which allows the members of the development infrastructure to work in new ways. They will allow generating systemic-evolutionary competencies based on horizontal leadership and integrated organisation.

*Chapter 4* describes the types of exercises suitable to realise and train the connection between the development of personal competencies and organisational processes by exercising new skills, which will lead to horizontal leadership competencies and meta-competencies.

*Chapter 5* presents the framework of horizontal leadership competencies and meta-competencies for systemic-evolutionary development, as a result of the cyclical TRASE development pathway and the skills exercised. They enable conscious and responsible modes of intervention in organisations by overcoming behavioural spontaneity and developing a renewed awareness and consciousness of the individual, the context and the self as co-creator of the context.

*Chapter 6* presents some national and international application cases: a family business, a medium-sized municipality, the Italian headquarters of a multinational company, a German bank and a hospital in Brasil; the master's course on horizontal leadership is also summarised.

*Chapter 7* describes the application of the HOLIO methodology to local development, based on a systemic-evolutionary vision of the territory and reports on a case of application in Sicily.

*Conclusions* proposes summary reflections on the peculiarities of the methodology and outlines future prospects for the further development of organisational humanism.

Finally, the part *For further reading* shows the study on the development of the HOLIO methodology, which the writer wanted to entrust to an external observer, competent in the sector. The study was carried out by Prof. Antonia Chiara Scardicchio<sup>3</sup> and contextualises the HOLIO methodology in the context of reflections on complexity in the training for organization development and new competencies, following her 6-year participatory observation.

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<sup>3</sup> Antonia Chiara Scardicchio is an associate professor of General and Social Pedagogy and teaches at the Faculty of Philosophy and in 8 courses at the School of Medicine of the Aldo Moro University in Bari, Italy. She has taught Design and Evaluation of Educational and Training Systems at the University of Foggia. She collaborates as a lecturer in several master courses for public administration dealing with transversal competencies. She has worked in management training in large companies and organisations of various kinds.



The book is aimed at trainers, consultants, managers and entrepreneurs who are interested in new visions and practices to deal effectively with change, renewing the meaning of work as an opportunity for personal, organisational and social development. What is proposed will be particularly useful in designing sustainable remote working paths, avoiding the risk of excessive individualisation and fragmentation of work, thanks to the enrichment of face-to-face moments: these should be an opportunity to renew the sense of belonging, stimulating connections for personal and organisational growth.

What is proposed can also be of use to all those who work in various roles in organisations, to contextualise the perception of their own working identity so that they do not feel defined by the context, but contribute to defining it themselves, acting from a personal initiative and leadership as agents of change.

Finally, the methodology can also be of use to those interested in a multidisciplinary type of social research, which is not limited to describing reality, but aims to transform it, into a knowledge process which, as far as socio-economic dynamics are concerned, and in particular organisational dynamics, is inescapably linked to exploratory action.

It has to be pointed out that the horizontal leader summarises many of the characteristics of the mentioned subjects: he/she is an entrepreneur, manager, consultant, trainer and researcher at the same time. He/she is a multi-disciplinary figure, who will increasingly have to integrate various professional skills.

The following chapters present the general framework of the application of the HOLIO methodology in its complete sequential mode, for the implementation of which the change facilitator should already have acquired horizontal leadership competencies. Within this framework, the proposal intends to stimulate in those who feel the need to renew their approach to change, the interest in experimenting with the methodology and in using it, even in reduced or different contexts from those presented.

The HOLIO methodology wants to respond to the challenge of not looking for well-being only outside work contexts, as often happens, abandoning the complexity of organisational life to utilitarian visions that undervalue human potential. Instead, it proposes that people find the essence of the vital meaning of work in the transformative and generative possibility of their own work identity, in connection with that of the organisation, thus becoming social actors.

## 1.1. The roots: the action-research process starting from critical organisational issues

When I joined the CNR (Italian National Research Council) in 2000, after research experience in the field of social statistics and innovation management, both in a large company and in European projects, as well as development consultancy in private organisations and government bodies, having observed many critical points in change processes, I promoted an international research to identify the causes of the problems encountered and to identify more effective ways of intervention. I chose the action-research approach to overcome the separation, in my view the cause of many problems, between the professional groups dealing with organisational change: researchers, consultants, trainers, managers and entrepreneurs.

The research, therefore, involved all categories of stakeholders from the outset and was carried out in two main phases<sup>4</sup>:

1. from 2000 to 2010: analysis of cases, of the literature and detection of recurrent criticisms, the first definition of a new methodological approach, experiments in profit, non-profit, public, local development and placement projects (Rizziato, 2007a, b; 2008a, b, c; 2010a, b), (Rizziato et al., 2008a, b, 2010);
2. from 2011 to 2017: enlargement and differentiation of the experiments, consolidation of the new paradigms and definition of an accomplished methodology for the development of organisations and people, as well as of competencies for working in complexity (Rizziato, 2011, 2012, 2014, 2015, 2016, 2017a, b, 2018a, b, c), (Rizziato, Nemmo, 2012a, b; 2013; 2018), (Rizziato, Nemmo, Giachi, 2014). In 2014, the IMO Italy community was created, in the contest of the International Foundation IMO, to propose the reached results to a wider audience of stakeholders. In 2024 IMO Italy became a spin off company of the CNR<sup>5</sup>.

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<sup>4</sup> Almost the most representative participants of the core group of the project were Prof. Francesco Novara, head of the Olivetti psychology centre for 30 years, lecturer in work psychology and ergonomics at various Italian universities, Silvano Del Lungo, who participated in the start-up of that centre and later founded the consulting firm Studio Staff, for many years President of APCO (Italian Professional Association of Management Consultants), the Prof. Adrian Bekman, from the Dutch foundation NPI (Netherland Pedagogic Institute), consultant and lecturer in organisational development at various Dutch universities, then founder of IMO Foundation and John Luijten, senior consultant NPI and IMO International, occupational psychologist and manager in Dutch public and private bodies, Andrea Gandini, lecturer in economics at the University of Ferrara, consultant and director of the CDS study centre. ISFOL also participated in the first phase of the research. For further details on the research group see Rizziato (2010, 2018).

<sup>5</sup> For more details [het-imo.net/it/](http://het-imo.net/it/). IMO International Foundation is a community and a network of consultants, managers, trainers and social researchers which works with similar principles for human and organization development in 11 countries, for more details [het-imo.net/](http://het-imo.net/).

To grasp the peculiarities of the methodology, it is good to consider the criticisms it has sought to address.

The causes of failure of organisational development interventions, which the action-research group identified in the first phase of the project, were, in summary, the following:

- the change does not respond to actual client needs but to internal optimisation and/or rationalisation;
- those who have to bring about change by transforming their work processes are not involved in the design of these processes; people are not activated based on a principle of responsibility but based on functional and power logics;
- answers are often given to questions that have not been concretely clarified from the outset; abstract representations of the problem are used, unrelated to the client's process;
- it is not clear who will lead the transformation process from beginning to end;
- often new ways and technical solutions are sought, removing the organisation's past, its biography, which instead emerges as a strong hindrance in the application part;
- consultants are often asked to intervene in a decontextualised manner; this reflects the cultural difficulty of looking at an organisation as a single reality and determines the discomfort and often the ineffectiveness of having to set up fragmentary interventions in the absence of a global vision;
- consultants tends to propose solutions without accompanying the change, where the real difficulty is the concrete implementation;
- training interventions aimed at promoting change are not interlinked with a new organisational strategy aimed at enabling trainees to apply what they have learnt immediately to their reality;
- rationalistic reductions in organisational complexity are applied through planned change which, in practice, cannot be realised; in fact, in the application, there are variables, not known at the outset, which hinder what has been defined in theory;
- rigidity emerges of those who have responsibilities in the organisation in a management logic (working with hierarchy and systems) without the integration of forms of leadership (working

with people and culture) with the difficulty of acting as an element of synthesis of organisational complexity and its real need for development;

- there are conflicts of interest between levels and sectors of the organisation, the loss of long-term strategy, the sense of the social utility of the organisation and thus the fear of a necessary replacement of the organisational paradigm (relations with the environment, structures, products, processes);
- often, the people involved in the change are instrumentalised, resulting in alienation at work; this is most often due to short-term profit objectives, which deprive the company of a production strategy and thus of a medium to a long-term guarantee of life;
- many interventions promoted by activating forms of interactivity, focusing on improving relationships, did not have the strength to transform the rigid structure, which acted as a brake on change;
- competence interventions are frequently developed in dialogue with managers in the absence of a link to the development strategy and without the involvement of people.

The critical points described above determine as a more general obstacle to development the demotivation of people to change their behaviour and to make the organisational transformation effective.

On the other hand, the following two determinants of employee motivation emerged from the reflections and analyses carried out within the project:

- being able to perceive the social utility of their work;
- being able to make a personal contribution to organisational development with specific responsibilities in transforming one's work reality.

These two elements are reminiscent of the well-known scale of needs proposed by Maslow (1954), which sees at the top, once the primary physiological and security needs have been satisfied, the emergence of associative needs, i.e. belonging and common activity, social individuation needs, i.e. non-gregarious relations, enlivened by differences and subjective contributions respecting personal autonomy, and finally, the need for self-fulfilment, whereby the human being "must be what he can be, must become what he is capable of becoming". Maslow in his studies highlights

the inter-connectedness of these needs noting that “employees may have self-protective reactions aimed at preserving what they have acquired, but they only move with enthusiasm for what they do not yet have”.

Starting from these summarising considerations, it was deemed necessary to focus, in the next phase of the project, on concrete cases of successful organisational development experiences at both economic and social level. It was therefore decided to investigate and extrapolate the methodology underlying the brilliant experience of organisational development carried out by Adriano Olivetti, as well as to investigate the approach inspired by Bernard Lievegoed practised in over fifty years by the NPI Foundation in profit, non-profit and public organisations<sup>6</sup> and then to compare the two experiences. The two cases were chosen from the point of view of the quality and duration and extent of the practice developed, which were found to be particularly significant compared to similar works<sup>7</sup>.

From the analysis of the two good practices, as well as from the study of the literature and above all from the interviews and testimonies collected during the action-research process from the various stakeholders involved, new epistemological assumptions and consequent methodological lines for the organisational development were derived, which were then tested in the following years.

The experiments regarded profit, non-profit and public organisations in development projects, local development and placement projects, and led to various revisions of the methodology over time<sup>8</sup>. The book presents the final and complete version.

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<sup>6</sup> The Dutch foundation NPI (Dutch pedagogical institute for trade and industry) was created in 1954 by the Dutch psychiatrist Bernard Lievegoed when he was offered the chair of social pedagogy at the Erasmus University in Rotterdam: he accepted but wanted an institute through which he could research in the field, to teach from the reality of life and not from books. As a psychiatrist, Lievegoed founded various curative pedagogy institutes and educational institutions. In 1961, he helped to found the Technical College in Twente, which later became the University of Twente, where he was a professor of social economy and Dean of the Department of Economics until 1973. Between 1968 and 1976, among other things, he published important texts on organisational and human development, which have been translated into eight languages. In 1971, he founded the Free University of Driebergen (Vrije Hogeschool) and was its headmaster for about 11 years. His ideas contributed to the development of various training centres for companies, including the De Baak management school. The Dutch Publishers Association awarded him the “Golden Pen” in 1983 for his contributions to the cultural growth of the country. In 2005 NPI was transformed by Bekman and colleagues into the IMO International foundation. (cf. footnote 5).

<sup>7</sup> Including those on socio-technical systems carried out by the Tavistock Institut in London.

<sup>8</sup> Initially called Training-Development (Rizziato, 2010b).

## 1.2. Critical issues addressed by the HOLIO methodology in the context of current socio-economic needs

To understand the benefits of the proposed methodology today, it is useful to contextualise and examine the critical issues listed above in the current economic, social, cultural and technological framework.

We can summarise three key points.

### *(1) Individualism, organisational pathologies and discomfort at work*

The current times require us to change, to develop: ourselves, the organisations in which we work, the social contexts in which we live. The crisis caused by the coronavirus urges us, even more, to rethink how we set up our economic and organisational models, the scenarios in which they were built and the foundations on which they were based.

The change we are experiencing, especially due to the very rapid technological evolution and globalisation of the world, is of epochal significance. We have now fully entered the so-called Fourth Industrial Revolution, which will see the emergence of new models, strategies and paradigms, at the base of the so-called Industry 4.0. characterised by augmented reality<sup>9</sup>, new interfaces and dialogue between objects, the internet of things<sup>10</sup> and completely new forms of communication that pose the challenge of ethics in the relationship between the person and technology, highlighting the need to “inhabit (hyper)complexity” (Dominici, 1995-96, 2017, 2019).

But the social structures that underpin all this are “liquid”, as Bauman (2002) points out, characterised by the crisis of the concept of community and the emergence of unbridled individualism, resulting in a fragile society lacking points of reference.

In particular, the predominantly used organisational models are under discussion for the critical impacts they have on personal and social life. They emerge as the main causes of the psychological crisis, which nowadays is affecting work on a worldwide scale (Maslach, Leiter, 2000).

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<sup>9</sup> It is understood as the enrichment of human sensory perception through information, usually electronically manipulated and conveyed, that would not be perceived with the five senses, such as the dashboard of a car, exploring the city by pointing a smartphone, or remote robotic surgery.

<sup>10</sup> It means that objects (“things”) become recognisable and acquire intelligence by being able to communicate data about themselves and access aggregated information from others. For example, alarm clocks ring earlier in case of traffic, shoes transmit time, speed and distance to compete in real-time with people on the other side of the globe, medicine jars alert family members if you forget to take your medication. All objects can take an active role thanks to their connection to the Net.

The scientific literature consistently shows that workplace characteristics affect the level of stress and the number of health problems experienced by workers. Burnout syndrome, which involves the emotional and psychophysical exhaustion of the individual, is becoming increasingly widespread, affecting workers from different sectors. It is described as a “soul drain” within organisations, characterised by specific areas of “mismatch” between the person and their work (European Agency for Safety and Health at Work - EU-OSHA 2015-2016). Even more recently, the OSH Pulse survey conducted by EU-OSHA in 2022 shows that 27% of workers are affected by stress, anxiety or depression caused or worsened by work).

The World Health Organisation in 2019 included burn out in the list of medical disorders as a “problem associated with the profession” characterised by symptoms such as “workplace exhaustion”, “cynicism, isolation or generally negative feelings” and “reduced professional effectiveness”. It is a chronic form of stress, defined as work-related stress<sup>11</sup>, which presents itself with an increasing sense of detachment from the activities in which the person is involved.

Psychosocial risks and work-related stress, together with their negative repercussions on health and the economy, affect an extremely high number of workplaces in Europe and are a major concern for European managers, who should address them<sup>12</sup>.

Observing the trend of the data of the phenomenon, which has been continuously increasing over the last ten years, and the outcome of the surveys of work practices, it emerges that most of the time this obligation is dealt with procedures that are not very suitable to solve the problem from a structural point of view. This criticality, which is found in almost all of the obligations “necessary” for organisations, such as, for example, the procedures for quality certification, or the bureaucratic practices required for the prevention of corruption, derives from a rationalistic and reductive vision of the organisation, divided into functions and parcelled out into activities. This approach, while it may have yielded satisfactory results in a situation of relative socio-economic stability, shows lot of limit in situation which require change.

We suffer from a cultural lag in the conception of organisation and people at work, which, despite the introduction of new obligations and visions, does not allow for significant change.

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11 In Italy, the Consolidated Act on Health and Safety in the Workplace (Legislative Decree no. 81/2008) obliges companies to draw up a Risk Assessment Document that also includes “special risks”, including those related to work-related stress, according to the contents of the European agreement of 8 October 2004.

12 The obligation stems from the Framework Directive 89/391/EEC.

An example of this is the difficulty and slowness in applying the standard on the Social Responsibility of Organisations (ISO 26000), particularly as regards the involvement of stakeholders, both internal and external, which places the issue of relationships at the centre (Pretner, Calore, 2014). In the same context, there are challenges for the realisation of the 2030 Agenda for Sustainable Development<sup>13</sup>, which interconnects various critical issues of our time, recalling the need for an overall vision of development and its sustainability from the environmental, economic and social points of view.

To broaden the picture and the awareness of the nature of the critical issues to be addressed, it is useful to consider the studies on organisational pathogenesis (Merry, Brown, 1987; Novara in Rizziato, 2010a), which define the characteristics of organisations in “neurosis”, in severe psychological distress or “neurotic”, organisations in irreversible decline (similar to the “psycho-economic” conditions of the individual) which then determine various pathologies in people at work. In short, these are the characteristics of organisational pathologies:

- goals, values, norms: there are no shared goals, values and norms, converging commitments; needs are not well identified and prioritised and consequently there is no discrimination, in the exchange with the environment, between what is to be taken and given and what is useless and can be harmful;
- functioning: it is ineffective and inefficient, as a result of internal disruption and a lack of control over the environment; there is an inability to plan for the long term, a disorder in decision-making allocations, inability to find timely and innovative solutions, dispersion of energies in last-minute remedies;
- communications: are restricted, inadequate, feedback information is lacking; there are mistrust and conflict, even destructive, between sectors; communications to senior management are filtered and reticent, allowing little knowledge and control of internal performance and external exchanges;
- the organisational climate: low morale, frustration, passivity; abandonment of the organisation by good people, bitter resignation to stay for those who have no alternative, uncomfortable socialisation of recruits;

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<sup>13</sup> It is a programme of action for people, planet and prosperity, signed in September 2015 by the governments of the 193 UN member states. It consists of 17 Sustainable Development Goals and a broad action programme to achieve 169 goals. many projects have been launched in the direction of sustainable development and will set the course for the next 15 years.



- the internal image of the organisation: following unsuccessful attempts, a sense of impotence and inevitable failure (failure script) may spread; the self-image of failure builds a reality that reflects it;
- foreseeable developments: there may be a stage of difficult “neurotic” equilibrium which, despite the malfunctioning of parts of the organisation, is maintained by a sufficient level of leadership, communication, activation; if problems are eventually addressed effectively, the situation is reversible and functionality and well-being are recovered; if, on the other hand, problems are not resolved, the organisation enters a stage of decline and resources of all kinds deteriorate, the environment gets out of control; there are recurring periods of crisis related to cyclical difficulties or critical events, for which precarious and often illusory remedies are attempted, which do not stop the disintegration.

We speak of a “neurotic style” of an organisation that can be characterised as paranoid, compulsive, dramatic, depressive, schizoid. In these typical frameworks, the personality of the person in charge of synthesis, orientation and command is of great importance. The result is a variety of pathologies also for individuals, linked to stress-related dysfunctional work.

Only by seriously confronting the problems can a process of recovery of “organisational health”, i.e. of operational effectiveness and well-being, be initiated. This confrontation with the problems has to do with an awareness of reality, which cannot be represented only by objectively detectable data but also involves personal experiences and above all the effect of organisational action on the beneficiary. The “healthy” organisation is dedicated to objectives that are vital for its environment, and “from the shared pursuit of these objectives descend the order of functional relations, the synergy of competencies, the system of reciprocal responsibilities, which generates a community of people working in the service of the social community” (Novara, 2008).

## *(2) Crisis of traditional approaches to change and the conception of person and organisation as independent realities*

Both from personal experience of more than 20 years in innovation and development consultancy and from comparisons in the action-research project, as well as from the analysis of various studies on the effectiveness of traditional approaches, such as business process reengineering, lean

organisation, total quality management and other forms of intervention, it emerges that on average 80% of cases lead to unsatisfactory results or stall (Mosadeghrad, 2014; Senge, 1990; Novara, 2008 and in Rizziato, 2010a; Pettigrew, 1988; Beer, 1990; Boonstra, Caluwè, 2007).

A key element is the lack of motivation of people, who hardly change their working behaviour and provide creative input to new strategies defined at the top if they have not been involved. There is an organisational culture that is not very open to change, a lack of client focus and weakness of managers in involving people and inspiring them with clear goals. Another important element is the inadequacy of traditional organisational structures concerning the dynamics of change, which require specific ways of interacting in forms suitable for the purpose.

In the attempt to change, approaches are more often than not taken out of context concerning the specific situation of organisations. They plan to change at the top without involving people and collide with behaviour and interaction patterns whose meaning they ignore. In this context, it is difficult for the top of the organisation to act as a realistic synthesis of what specialisations and generalisations separate. The result is a lack of shared directionality, which is an essential basis for active participation.

To try to remedy these problems, various types of interventions are often proposed to improve relationships in training or coaching courses, which are however detached from the real work processes, and which hardly lead to significant added value in the situation. This is despite Kolb's studies on action learning (Kolb, 1984) and Knowles' studies on andragogy (Knowles, 1973, 1996), which highlight the need to overcome traditional content settings that are abstract from reality, in favour of the creation of self-directed learning processes, based on the responsibility of the learner, as well as on the concrete sharing of the training project and its aims. Therefore, training courses and seminars that aim to stimulate change often do not have a follow-up and verification in real situations, as the fundamental transition from theory to the concrete reality of work is not accompanied, which is faced with the difficulties of transforming work behaviour. This can also be observed in the case of outdoor training experiences which, although they have the merit of taking learning out of the classroom, making it experiential, in most cases they do not take care of the connection with the specific working reality of the participants.

In the experience of designing, conducting and evaluating adult education courses, "the acquisition of certainties and solutions prevails, which does not stimulate the willingness to change, thus making it "sterile",

as is independent of people's work on themselves, their biography and their implicit mental models and epistemologies" (Scardicchio, 2012; D'Agnesse, 2007).

Useful training is needed at various levels in the organisation, which cannot do without aspects such as personal leadership, investigation of one's mental styles, shared vision, group learning and systemic thinking (Senge, 1990; Senge and Goleman, 2016; Scharmer, 2018). Otherwise, the result is passive behaviour on the part of people concerning the possible improvement of their work processes. Above all, it is necessary to connect the strategy with the actions of change by involving those who have to implement it.

The delay in doing so has resulted in interventions with little impact on organisational dimensions, as demonstrated by the use of Kirkpatrick's (1994) famous model for detecting training outcomes.

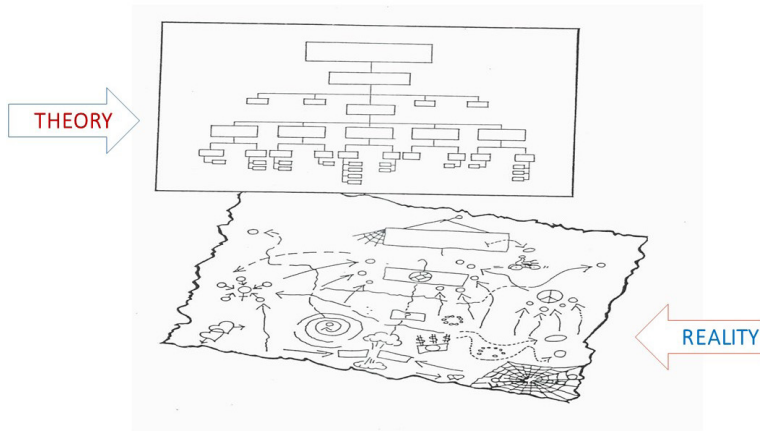
It shows that most of the time it stops at personal learning, which hardly becomes new working behaviour and even less contributes to improving working processes.

One of the reasons, in the words of Schein (2009), is that "most top executives are unfamiliar with the issues of cultural evolution, a job that requires patience, reflection and a willingness to find a new balance between results orientation and process orientation. So... they don't get their hands on it". The effect is that one is constantly confronted with situations in which what is said is often different from what is done: decisions are made that do not materialise, mission and vision statements are made that are not pursued, large projects are defined, which are difficult to sustain in the urgency and complexity of everyday life.

It can be observed that the organisational models and approaches upstream of these critical issues are characterised by intervening either on processes or on people, considering the two realities as an independent. This is despite the studies of social psychology, which have long pointed out that the connections between the person and his or her context are of mutual creation (Hoscking, Morley, 1991).

The individual is seen as *homo economicus*, an elementary mechanism activated by the impulse for personal economic gain, a "rational" being in the sense that he pursues the maximisation of his well-being with the minimum of effort.

The organisation is considered as a "structure" capable of producing profit: people are "human resources" which, although having specific characteristics and properties, basically instrumental resources, to be combined in appropriate processes with other resources to generate profit.



*Fig. 1.1 - The rationalist illusion*

Widely used consulting approaches have often proposed “rational” solutions, which the client should accept and introduce, most of the time having to find that they are inapplicable because they are abstracted from the concrete reality of organisational life and its history.

This type of organisational model has revealed several dysfunctions: the illusory character of the reliability of the rules and the possibility of imposing them without generating internal and external rigidity, together with the equally illusory confidence of achieving the best organisational ends through the sum of procedural fulfilments; the ineptitude of “machine theory” in studying the complexity of organisational structure and functioning, given its lack of attention to subsystems with their different dynamics and their peculiar process of interchange within the organisation; the misconception of organisational reality as a rigid, static arrangement of parts, rather than as a dynamic process of relationships, subject to continuous adaptation (Novara in Rizziato, 2010a).

Attempts to overcome vertical structural logics, such as matrix and project organisation, have shown the limits of a change of form that, in the persistence of the traditional managerial mentality, has not led to the desired results. For the same reason, also the introduction of new visions of processes and organisation, as in the case of a lean and learning organisation, did not have the strength to substantially change the organisational set-up. Most of the time, the former has been perceived in a too technical way, without

involving people, and the latter has been implemented more as a training activity in itself, rather than an opportunity for organisational development (Bekman, 2007 and Rizziato, 2010a).

In the international network of action research, action learning and organisation development, the current socio-cultural context is discussed in terms of “Cartesian catastrophe”, pointing out that it has led us to separate the mind from the heart, reflection from the action, the self from others, with the consequence, for example, of conventional health research excluding patients, of research on educational development excluding students. In that context, the major challenges of the next industrial revolution are summarized in three main points: 1. systemic thinking; 2. relational skills to engage people fully and collectively; 3. generativity, i.e. defining ourselves through what we want to create for the future (Reason, Bradbury, 2008, 2015)<sup>14</sup>.

Finally, it should be emphasised that even when the social sciences have interpreted the organisation as a “system”, in an attempt to overcome the vertically structured vision, for a long time the concept of the company as a “closed” system prevailed, which, while grasping the element of complexity, analysed the problems within the framework of internal structural relations, omitting to consider them in relation to the external environment (Novara, Sarchielli, 1996; Katz and Kahn, 1966). As “open” systems, living organisms, whether biological or social, are instead in continuous exchange with the environment (Von Bertalanffy, 1966; Boulding, 1956; Lievegoed, 1973), even though they have their own identity that characterises them.

### *(3) The real economy, skills for complexity and remote working*

The “direction” of the change determines the feasibility of the change itself. If this direction is not perceived as sensible by the business community, it is not possible to realise a participatory development path, which is conducive to organisational health and thus to social and economic well-being.

The increasing financialisation of markets, especially of large corporations, and the progressive increase in the “extraction of value” rather than the “creation of value”, has led in many cases to people being reduced to the status of “servant-units” with social and environmental consequences that are proving disastrous, as highlighted by Luciano Gallino (2011).

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<sup>14</sup> Various professionals and researchers have long been exchanging views in this network to identify declinations of action research in different socio-economic fields at the international level. See also Senge, Scharmer (2001), Scharmer (2017).

After the frequent financial, environmental, social and economic crises of recent years, there is a growing need to generate a free and fair society, based on collaboration and cooperation, in which diversity is respected. This goes hand in hand with the importance of the de-financialisation of the economy and the fight against climate change. It is necessary to rethink the current capitalist model in which the extraction of value as the collection of profits, from shareholder dividends to bankers' bonuses, is rewarded far better than the actual creation of value. Urgent responses are needed.

To consciously answer questions such as: Where does wealth come from? Who creates the value? Who extracts it? Who takes it away? There is a growing need to move towards replacing the current parasitic capitalist system with a more sustainable, interdependent capitalism that can work for all (Mazzuccato, 2018).

The document published by the Business Roundtable<sup>15</sup> in August 2019, entitled "Statement on the purpose of a company", should be read in this direction. A manifesto signed by almost 200 CEOs of the largest companies internationally, marking a shift away from the "primacy of shareholders" in the management of the company, a concept that had existed in the group's principles since 1997, to "include a commitment to all stakeholders". It is recognised that "businesses play a vital role in the economy" by promoting innovation, providing essential services and providing jobs. The interests of shareholders are therefore put on an equal footing with those of clients, employees, suppliers and the wider community. "We are committed to providing value to all of them, for the future success of our companies, our communities and our country".

This change of perspective will, however, have to reckon with established practices of relations and behaviour that will not be easy to renew.

Stakeholders undoubtedly include the community within the organisational context, with respect to which questions are being asked in institutional and research circles about what skills are needed to manage the increasing complexity brought about by technological and social innovations<sup>16</sup>.

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15 A non-profit association based in Washington, whose members are CEOs of the most important American companies, such as Jeff Bezos of Amazon, Tim Cook of Apple, Mary Barra of General Motors.

16 The future of jobs, Report World Economic Forum 2023, CIPD International Conference 2023. Research Robots, artificial intelligence and work in Italy promoted by AIDP (Associazione Italiana Direttori del Personale) and edited by Doxa in 2018 and international CIPD conference in Manchester in November 2018. European Parliament (2006); Rizziato, Nemmo (2018); National Research Council (US) (2011); Soft Skill for Talent research by Manpower- Group (2016); Senge, Goleman (2016); Cepollaro (2008). AIF National Conference (2018).

There is a growing need for *soft skills*, also called transversal, alongside *hard skills*<sup>17</sup>. The former is characterised by creativity, systemic thinking, emotional intelligence, cognitive flexibility and a lifelong learning attitude; they should allow benefiting from technology, overcoming the fear that people can be replaced and/or managed by it.

We are now talking about a *skill revolution*, which implies a cultural change, a new way of looking at organisational responsibilities and a necessary *back-to-human* approach.

In this regard, it is interesting to consider the work of Argyris and Schon (1978) who explain how in organisational systems the natural processes of development of individuals are often directly opposed, creating uncomfortable situations, where most of the time those who remain are because they have found an infantile adaptation for their existence. The authors highlight how, on the other hand, the possibility of being able to grow as a personal awareness in the organisational context progressively allows the context to be adequately understood, opening up spaces for significant contributions to development. Along the same lines are the studies of Mc Gregor (1973), for whom “... management techniques seem to move from the conviction that the average individual has stopped at the stage of development corresponding to early adolescence”.

In the now unavoidable prospect of overcoming these methods of managing people, which remain and are widespread, in this phase of the beginning of the era of artificial intelligence, the fundamental issue arises of how to concretely define the necessary new skills and competencies, the paths to generate them and the new related organisational models, which can offer new possibilities for development.

In this regard, the World Economic Forum’s 2023 Report<sup>18</sup> shows that analytical thinking and creative thinking remain the most important skills for workers in 2023. Analytical thinking is considered a core skill by more companies than any other skill and constitutes, on average, 9% of the core skills reported by companies. Creative thinking, another cognitive skill, ranks second, ahead of three self-efficacy skills: resilience, flexibility and agility; motivation, self-awareness, curiosity and lifelong learning,

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<sup>17</sup> Soft skills are usually understood as abilities of an individual that are conducive to effective and productive interaction with others, both in and outside the workplace. Hard skills, on the other hand, are technical abilities.

<sup>18</sup> Similar to previous editions, the core of the 2023 Future of Jobs Report is based on a unique surveybased data set covering the expectations of a wide cross-section of the world’s largest employers related to job trends and directions for the 2023-2027 period. This year’s report brings together the perspectives of 803 companies,- collectively employing more than 11.3 million workers across 27 industry clusters and 45 economies from all world regions.

in recognition of the importance of workers ability to adapt to disrupted workplaces. Dependability and attention to detail, ranks sixth, behind technological literacy. The core skills top 10 is completed by two attitudes relating to working with others: empathy, active listening, leadership and social influence, as well as quality control.

Previously, the World Economic Forum in Davos in July 2019 highlighted the relationship between technology and human skills, pointing to the need to strengthen aspects such as creativity, initiative and critical thinking, as also expressed by Jack Ma, founder and CEO of Alibaba, the online trading Chinese giant:

“The computer will always be smarter than us: it never forgets, it never gets angry. But the computer does not possess wisdom [...]. We can’t teach our children to compete with smarter machines, we have to teach them something unique, something that machines will never possess, like values, trust, independent thinking, working together, caring for others. That’s why I think we have to teach children about sport, music and the arts in general, otherwise, we will have serious problems in 30 year time.”

The more artificial intelligence replicates human faculties in an enhanced way, the more we are called to question what is peculiar to humans and cannot be “cloned” if we do not want to lose the sense of personal and collective action.

The issue of new skills emerges with particular urgency in view of the increasing use of remote working following the coronavirus crisis and lockdown in many countries. It is estimated that around 8 million Italians have worked from home or at work however remotely, compared to a previous figure of around 500,000<sup>19</sup>. This is a far-reaching forced social experiment that has opened the door to new forms of work. They will have to be managed with an equally new culture, oriented towards increasingly empowered and autonomous forms of work, including higher quality in face-to-face interactions. It will be necessary to strengthen leadership at all levels, overcoming functional short-sightedness, asking for flexibility, but also granting it, in the search for new balances between in-person and remote work, stimulating collaboration and initiative for a conscious connection between the various organisational processes focused on the added value to be given to clients/users.

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19 Smart working survey promoted by CGIL and the Di Vittorio Foundation (2020).



## 2 - Fundamentals

*"He who loses the image of his future  
has lost his existence".  
(Werner Gilles)*

### Foreword

In the 1980s, the famous research work published by the Stanford Research Institute, "Changing the image of the man", highlighted the need and urgency to clarify on which anthropological image we intend to base the future, describing how it has determined the social, economic and juridical order over the ages. In the work, which is the result of a large multidisciplinary group of researchers, proposes to go beyond the vision of homo aeconomicus in favour of an image of the person as a "multi-dimensional system", oriented by an ecological ethic of personal and social development. The concept of ethics refers to the development of a personal identity that is in harmony with the social context (Cambell et al., 1982).

In Adriano's Olivetti, the image of the human being was consonant with the proposal of that study, taking inspiration from the communitarian personalism of Maritain and Mounier (1955)<sup>1</sup>, according to which the person is characterised by the presence of the spirit and is not exhausted in the individual subject, but tends towards a transcendence that allows it not to be reduced to the context and situation in which it finds itself. The world and all things acquire meaning and value precisely by virtue of this "tending", without which there would be no meaning or value. This vision is close to that of the American humanist psychologists, who see in Maslow (1954) one of the most significant exponents. For him, therefore, the healthy individual is the one who becomes what he is, not merely "adapted". He recognises in what he calls the "third force" a quid specific to each individual that determines in a particular way how he or she will react to hereditary aspects and the environment in which he or she finds himself or herself, a sort of higher consciousness, as also proposed by Assaggioli (1977) with his psychosynthesis, by Jung (1935) in the tendency of the I towards self-recognition, in what he defines as the "process of individuation" and by Lievegoed (1973) who proposes a mature vision of personalism inspired by Steiner (1979).

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<sup>1</sup> Later taken up in the long work of Francesco Novara at the Olivetti psychology centre, see Novara et al. (2005), Novara (1998, 2008).

Interesting is the assonance of these positions with the studies of quantum physicist Federico Faggin (2019, 2022) whereby at the centre of the world is consciousness, not matter. He emphasises that we must make ourselves realise that it is absurd to think that everything that exists must be reproduced in a laboratory and that experience is a quantum phenomenon. This is the belief that science must find answers to all fundamental questions and not eliminate what it cannot explain from reality. It is the consciousness, endowed with free will, acting on the body, while official science affirms the contrary. He argues that to remain free men, we are called to connect thought, heart and action: just as spirituality must understand rationality and not give dogmas, so must science, which is expected to understand the world of feelings and not create materialistic dogmas.

The vision of the human being at the basis of the HOLIO methodology refers to these positions, considering the individual and his constructs in the broader context of the social systems studied by Luhman (2001) and Parsons (1991), and to the work of Maturana and Varela (2001), Baetson (1993, 1994), Von Foster (1991), for whom what is known is inextricably linked to the knowing subject. No knowledge can therefore be considered “objective”, in the sense of being inherent to the properties of the known object and the role of the observer, far from being passive and neutral, configures knowledge as an active form of construction starting from one’s comfort and mental constructs, the result of personal experience (Kelly, 2004). In this regard, Goethe points out that what we can consider “objective” is not knowledge itself, but the connection that each person makes between perception and concept (Zojanc, 1999; Zojanc, Seamon, 1988). It is therefore important to investigate to which concepts we link our perception, but also how our concepts orient our perception. For example, if I think I am not a good leader, I will tend to perceive more the negative feedback I get in situations, rather than paying attention to the positive things I do, thus confirming the opinion I have created of myself. This is the so-called “self-fulfilling prophecy” highlighted by the sociologist Merton in the 1950s, amply demonstrated by recent neuroscientific experiments that have measured the effect of intention on the context around us and how the change of “beliefs”, i.e. thoughts that have settled in us, can transform our reality, even physically, and even have a therapeutic effect (Poli, 2014, 2019).

The HOLIO methodology makes it possible to explore what inner dynamics make possible an evolutionary organisational and personal action concerning constructs that are harbingers of recurrent criticality.

A fundamental element is a motivation, the intention to change, which is made possible when the person is called upon to contribute to the

development of the organisation. The intention is a force that can be placed “above” the constructs themselves, allowing them to be “seen”, and is linked to the dimension of the search for identity.

In this way, connections towards self-realization are activated in individuality. This is why we have defined the image of the person based on the HOLIO methodology as “systemic-evolutionary”, as will be described in section 2.1.

Also regarding the organization, on the basis of the reflections in chapter 1, it is necessary to reconsider on what image development interventions are based on.

Weber (1958), in his reflections on post-modernity and techno-bureaucracy, highlighted the illusion of enlightenment reason by pointing out that “formal rationality”, instead of contributing to the realisation of universal freedom, has led to the “steel cage” of a techno-bureaucratic organisation that imprisons human life. This “cage” is still very much present today in the dimensions of work.

If real change is to be achieved, going beyond mere declarations of intent, one has to question the nature of organisational reality, its distinctive essence and meaning in the context of human society, going beyond the limited vision of a “structure” designed to create a profit or, in the public sector, to administer procedures and comply with laws.

New perspectives emerged some time ago, which now need to be concretely and widely implemented for a culture of sustainability that integrates people, the economy and the environment.

Morin (1993, 2002) specifies that “the organisation is what determines a system from different elements and thus constitutes a unity at the same time as it constitutes a multiplicity”. The sense of its action is related to the perception of the social significance of what it produces, which identifies it as a social actor, but at the same time makes it part of a wider context. Senge (1990) expresses a similar position stating that: “companies and other human enterprises are also systems. They too are linked by inviolable fabrics of interconnected actions, which often take years to fully exert their effects on each other. Since we are part of this web, seeing the whole pattern of change is doubly difficult. Instead, we tend to focus on images of isolated parts of the system and wonder why it seems that our deepest problems are never solved”.

According to Novara (2008), who experimented with Morin’s ideas in Adriano’s Olivetti, the organisation is a complex system, made up of variables of a different nature (individual, social, technological, financial,

administrative, commercial, legal, etc.) which give rise to a dynamic order in which change cannot distort the identity of the organisation: “Change is based on the pursuit of the aims of social utility which are the *raison d’être* of the organisation. The sharing of these objectives gives orientation and form to the interactions between the heterogeneous and contradictory variables: it makes them act in a dynamic life - *concordia discors* - in which the movement of the organisation is a key element. The effective control of processes, the achievement of objectives and the mental health of people all contribute to making organised work a fully human activity.

Also for Bekman (2007, 2010, 2017), the organisation is born out of a social service purpose, which determines its meaning. For him, an organisation is “the ultimate human creation” and reflects the soul of the human being (for better or for worse), which is becoming increasingly individualised compared to traditional communities: “Family life is given to us, as is everything connected to the reality in which we are embedded from birth: religion, nationality, language. An organised life is our ultimate and common creation: it asks us to come out of the past and create a possible new home for ourselves”. For Lievegoed (1973), organisation means “solving the problems of others”.

The HOLIO methodology is based on the above-mentioned assumptions, thus considering the organisation from a systemic perspective. It is an “open” system, in that it lives and finds its *raison d’être* in serving clients/beneficiaries through a product and service, but at the same time “closed”, in that it defines its own particular identity in how it fulfils its social service (not all furniture companies are the same, every pharmacy has its particular characteristics...).

If one wants to realise forms of development that are sustainable over time, it will be fundamental to consider that no component of the organisation can be analysed without being put into relation with the others, in particular: client/beneficiary, people, capital and territory. The originator of the systemic connections will be the client/beneficiary, considered a key element of the organisational identity. There is also an evolutionary element for the organisation, which emerges when observing and recognising its biography as characterised by specific development phases. It is seen as a living reality, in which the new needs of clients/beneficiaries and the maturing of internal relations can be observed in an osmosis of possibilities, which can inspire future development and the realisation of identity potential.

This potential can become a driving force for the development of a wider social and territorial system. The organisation is therefore seen as a social

subject, a “person of persons”, as Mounier (1955) claimed, with values that must not only be made explicit, as often happens in the “charter of values, but above all must be lived in the culture that inspires the behaviour of individuals. Values must live in ideas, in the sphere of relations and in ways of acting, as “founding” elements to guide organisational action, both in daily operations and in relations with external stakeholders. This allows the creation of modern working communities, in which the awareness of contributing to the creation of a collective value is one of the key elements of work motivation and the generation of one’s own social identity. For this reason, also for the organization, the HOLIO methodology is based on what we have called a systemic-evolutionary vision, as will be explained in section 2.2.

To create an evolutionary synergy between the development of persons and organisations, the approach to change proposed by the HOLIO methodology, which is contextualised as action science (cf. footnote 1, chapter 1), will be exploratory and experimental. With the type of vision of the person and the organisation proposed, it is not plannable, but only “generable”, as will be approached in section 2.3.

## 2.1. The systemic-evolutionary vision of the person

*“The working I does not grow if not through success  
in the effort to know and do, it needs to confront the  
difficult, it does not take ownership of the work when  
the intelligence is operational  
rather than self-critical”.*  
(Francesco Novara)

*“The meaning of life is to discover your gift.  
The purpose of life is to give it away.”*  
(Pablo Picasso)

Questioning the nature of the human, Morin (in Ceruti, 2017) notes that the nature of our identity is not taught in our schools and is therefore not recognised by our minds, pointing out that all the elements needed to recognise it are scattered in countless sciences and even in literature, whose masterpieces reveal human complexities.

Without wishing to enter into the complex debate on the definition of the self, the psyche, the ego and consciousness, which runs through the various disciplines, we can say that at the basis of the HOLIO methodology the person

is considered with his mental constructs and his implicit epistemologies, as a system that reads the organisational system and is contextualised within it in striving towards self-realisation. In doing so, it activates that element of higher consciousness recognised by the authors mentioned in the introduction and increasingly highlighted by neuroscience (see notes 2 and 3).

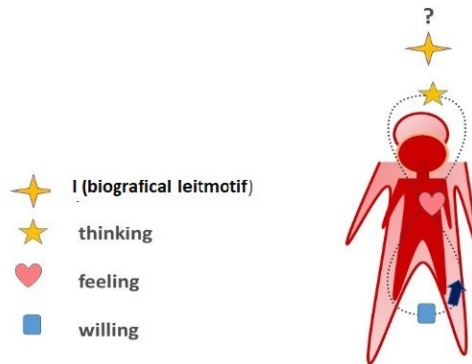
The systemic aspect in the conception of the person refers to the three ways in which we connect to reality: cognitive (thinking), emotional (feeling) and volitional (willing), which represent a psyche/soul dimension. In particular:

- *thinking*: the ideas/concepts we have formed about a situation based on previous experiences and new ideas/concepts we can generate by imagining new scenarios and as a result of new experiences;
- *feeling*: the emotions and sentiments that the perception of a certain context or our ideas and sensations stimulate us, or have stimulated us in the past;
- *Willing*: the actions we take driven by an idea, an emotion or a need.

From a physical point of view, these three dimensions, although connected, are mainly linked to certain areas of the body. The neuro-sensory system is linked to thinking, the thoracic system, with a mediating role between the other two, called the rhythmic system (for the heartbeat and breathing of the lungs) is linked to the feeling part, while the metabolic system, of the lower limbs, which generates energy is linked to the sphere of action. A great deal of research and experimentation is being carried out on the nature of the interconnections between the three levels<sup>2</sup>.

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<sup>2</sup> Neuroscience has discovered a neural network linking the three levels, identifying three “brains”: the head, heart and gut, each with its autonomy, but also constantly connected. The Heart Math Institute in California studies these connections, focusing on the centrality of the heart brain in relation to the other two. Rohen’s (2007) studies on the tripartition and connection of the three levels and Swedeler’s (2019) reflections are interesting in this respect.



*Fig. 2.1 - The systemic-evolutionary vision of the person*

The three levels relate to and are oriented towards our need for self-realisation. They are connected towards the definition of our identity core that we want to express, what Plato called Daimon, a core that allows us to make sense of things and choose new paths towards the definition of our individuality, understood as a higher level of consciousness to which the human being can strive, unlike animals. We have named it “I”; it pertains to a research, sometimes appearing amidst the changing of experiences of pain and pleasure, as something that persists. It is this perception of oneself over time that differentiates human beings from animals and allows them to guide their knowledge, freeing themselves from the present context of perception, to which animals limit their experiences, while also being able to recall past experiences. The I represents a force that only mankind possesses, which allows him to transcend the boundaries of time, activating a thought that reflects on the past and imagines the future, thus trying to be an actor in new creations and therefore also in his biography. It can be said that the I, can be found in a “biographical leitmotif” to which it relates and wants to bring to fruition as “self-realisation”.

It should be noted that we are not always aware of the mental models (ideas, judgements, principles) that inspire the behaviours that guide us and of the emotions and feelings that the perception of a context stimulates in us, and often not even of how the two are connected. It follows that many times the actions we perform are outside our sphere of awareness. We can say that we often act mostly unconsciously and reactively, in a spontaneistic way.

However, it is possible to activate a specific intention in the person to observe these dynamics, awakening the perception of one's leitmotif and developing a space of awareness to transform them by becoming aware of them. Neuroscience has shown that the power of intention in interactions is transformative in nature<sup>3</sup>.

Intention organises in a synchronistic manner a series of activities that are no doubt variable, chaotic at first sight and unconnected, resulting in a well-ordered dynamic system capable of designing itself. In other words, the intention is the basis of creation. Merleau-Ponty (1965) already defined the person as "a fabric of intentions", arguing that if it ceases to define itself by the act of signifying, it falls back into the condition of "thing", the thing being precisely that which does not know, that which rests in absolute ignorance of itself and the world. Intentions always have purposes, which allow them to be given meaning, content and concrete direction by manifesting themselves in actions. It is important, therefore, to ask ourselves what purpose drives our intentions, that is, what is the direction of our will, what image we have of the future.

Various studies analysed agree that there is no such thing as an intentional vacuum; if anything, there is an absence of awareness of one's intentions.

Contextualising these elements in the organisational reality, one can understand how important it is to have a shared and positive vision of development, as a goal to strive for, which will determine our intention to act, for better or for worse. A new responsibility emerges, that of the intentions of our actions, which should be linked to the dimension of meaning and the construction of socio-organisational well-being.

With the HOLIO methodology, we work on raising awareness of "unconscious intentions", which we have defined as *hidden inspiring principles* (or "hidden guides"), starting from a reflection on recurring criticalities, to reformulate them in a self-determined way. Critical issues should be read from the perspective of the client, who represents the organisational identity. This perspective gives moral responsibility not only

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3 In recent neuroscientific studies, it has been shown that intentions trigger the excitation of neurons, which in turn can lead to the activation of genes, making it possible for structural transformations to occur, as well as having a positive influence on other neuronal connections. Besides, it has been shown that our intentions, understood as purpose, influence not only attention-perception but also the process chain of thoughts, feelings and acts of will.

It has also been shown that the human mirror neuron system responds differently to, for example, grasping a cup for drinking or moving it from one position to another. The human mirror neuron system is therefore sensitive to the different intentions of the person performing an action. They are a class of "motor" neurons that are involuntarily activated both when an individual performs a goal-directed action and when the same individual observes the same goal-directed action performed by another individual. See Rizzolati, Sinigaglia (2006).



to our actions but also to our intentions. We can produce positive effects in our environment by tuning our intentions towards coherence and negative effects by tuning them towards fragmentation, separation, incompatibility and chaos. The possibility of perceiving our own and others' intentions allows us to consider ourselves as evolving beings, intentional agents, towards a perspective of self-realisation that is fulfilled by creating a kind of psychological infrastructure of shared intentionality, the basis of social and cooperative life (Tommasello, 2005).

Since our mental models are largely derived from our experiences, we have to experience new realities to create new ones. The HOLIO methodology works in this direction: the decisive element will be the definition of a "next step" to enter a new experience, which can set our inner world in motion and renew it, in a path of knowledge and definition of oneself and the organisation and oneself as co-creator of the organisation. To this end, the HOLIO methodology proposes an alternation between reflection, prospecting and action, as described below. In prospecting, an attempt is made to prefigure the action with assumptions that are different from those that generated the critical points to be overcome.

Based on the proposed image (fig. 1), with the pathway of the methodology for horizontal leadership and integrated organisations, we manage to work in such a way that people gradually become aware of how they can become leaders in the process of connecting themselves to the work reality. Managing this connection more and more consciously is a key aspect of what we have called horizontal leadership.

It is a path of possible freedom and creativity that we have explored over the years, in various organisational and local contexts, with very positive results.

It is about promoting the activation of people in transformative actions of themselves and their context.

To conclude with an image of synthesis taken from the studies of Lievegoed (1979), which summarises well the positions of the authors mentioned, we can therefore focus on three dimensions of the human being, which are completely interconnected: a transcendent one, a social one and a physical one.

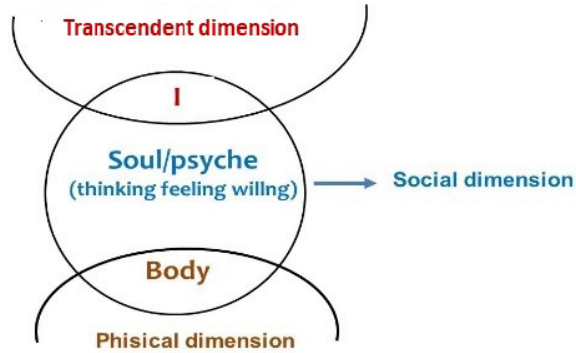


Fig. 2. 2 - The three dimensions of the human being

Contextualising the I in a transcendent world does not necessarily have a religious connotation. It refers to that dimension that goes beyond the subjective, spontaneously perceived and is connected to something that characterises our “push” and “search” in life, what we call the biographical leitmotif. It is a potentiality of the thinking that rises from the ordinary and can grasp reality at a meta-level, like the laws of mathematics and the universe. So we can “observe” ourselves as an “object”, while doing so from our subjectivity. To observe the direction of the steps taken, trying to grasp their essence, is fundamental to inspire our future steps.

The potential of human thinking is enormous, as the recent neuroscientific studies mentioned above and many others on mindfulness are demonstrating.

To take up the concepts expressed in a symbolic image, we can recall Ulysses’ exit from the cave of the Cyclops, the archetype of human intelligence, which took place under the ram, whose horn, turned in on itself, symbolises reflective thought and self-awareness<sup>4</sup>. The companions, on the other hand, will come out clinging under the sheep.

*“Three ewes each man carried; then there was a ram,  
the most beautiful of the whole flock - and I clung to  
the back of that one, huddled under its woolly belly,  
and then, with my hands twisting the beautiful wool  
without ceasing, I held it with a patient heart”.*  
(Odyssey IX, vv. 431-435).

4 For the scholastics, “recurvatio in sé ipsum”, the splendour of self-awareness as self-reflection.

### 2.1.1. *Development and life stages*

The connections between the constituent parts of the person have dynamics that depend on the phases of life. Based on Lievegoed's (1979) studies on this subject and after many years of biographical work with groups of people in different age phases, the following indications are proposed as a framework for working on personal development in the organisation.

As well as having a physical evolution, individuals also have an evolution of the psyche (which we have understood as the three levels of thinking, feeling and willing) and of individuality that is defined over time.

Psychological and biological development are not reversible, they proceed in stages and steps from layer to layer. In childhood, psychological development is highly dependent on biological development (the onset of an illness is often detectable above all in behaviour and mood). In growing up, this direct dependence is trained and the individual's strength begins to influence the psychic development of thinking, feeling and willing, gradually becoming recognisable in the way difficulties are overcome.

In the second half of life, the individual level can have a greater influence on psychic performance than biological involution, becoming increasingly important after the age of 40-45. The development of the psychic plane after this age, therefore, moves between two possibilities: one line that follows biological involution and another in which a new level in the quality of behaviour can be reached, as shown in the figure. Whether one or the other possibility will be realised depends on the individuality and his or her intentionality and determination to invest in a new pathway. If the person identifies with the current of vitality that has supported him up to that point and makes his self-esteem and self-perception dependent on his physical pre-stations or his work routine, he will have to make more and more effort to maintain the old level and the psychic hardening will go hand in hand with the biological hardening.

The other possibility is to ascend to a new level of creative strength, reaching broader horizons and a greater capacity for foresight. The creative capacity can thus continue for a long time until, in the end, it too is subject to the influence of physical breakdown.

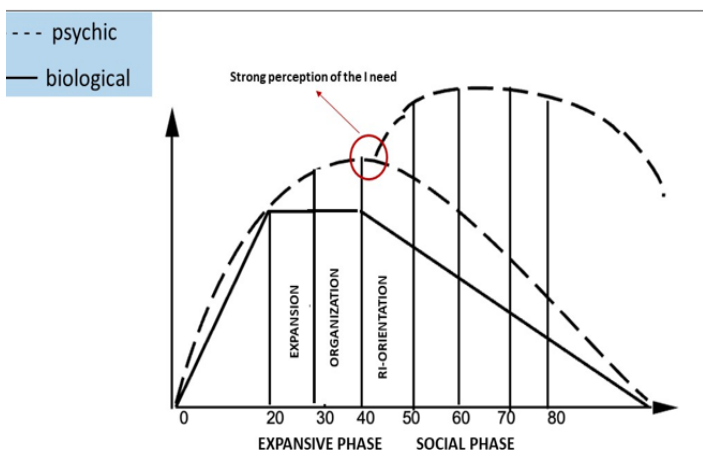


Fig. 2. 3 - Phases of working life, biological, psychic and the I influence

The choice of path after the age of 40 is an individual matter, which is characterised by the biographical leitmotiv, the task which the individual tries to identify throughout life and which represents an existential goal. The leitmotif becomes graspable in the subject's reaction to hereditary factors, education and living conditions.

The life choices of each person, determined by the interaction of the individual, psychic and biological planes, progressively shape the individual biography, which in this sense is a "human creation".

The types of choices in times of crisis and transition are also greatly influenced by the working conditions and the atmosphere of relationships between individuals.

Considering in detail the life phases in relation to work dynamics, as shown in the figure, the following can be defined: the expansion phase (from 20 to 40), which in turn is subdivided into the expansion period (from 20 to 30) and the organisational period (from 30 to 40), and the social phase (from 40 to mid-60).

The period from the twentieth to the thirtieth year is marked by a strong vital-psychic tension and the attitude of the soul is one of expansion towards the world. The young person of this age expresses a great deal of social creativity: he has to ensure that his bosses and colleagues accept him for his performance and his way of relating to others, and he will also create his own environment and lifestyle outside work.

Around the thirtieth year, a change begins, many experiences it as a definitive farewell to youth; emotional lability diminishes, people tend to become more objective, observing things with more detachment and calmness, the rational element takes over.

The period between the ages of 30 and 40 is a period of consolidation, in which the career is at the centre, judgement is made in a disenchanted way and action is taken after reflection: the problems of life in general, work and planning for the future are dealt with rationally. In this phase, the person will have to learn to organise the context and himself and to take responsibility to be able to act from his system of principles. At the age of 35, the person is at the centre of life, the life forces are still supporting him, the intellect has reached the highest level of development, the will is directed towards facts with concrete content and problems with social content are solved on a rational-organisational level. Around the age of 40, a crisis of values arises, first occasionally, then increasingly often. One has achieved what one has fought for and wonders whether it makes sense to continue in that direction, with a feeling of insecurity and unease. This is the time when one's representations and values are tested.

Throughout the expansion phase from the age of 20 to 40, the individual is supported by the life forces he experiences and sees himself at the centre of the world around him: the emphasis is on the "I" (I am successful, I run the department well, I do well in business). The crisis that arises, if successfully overcome, leads from the "I" to the "we"; the question will often no longer be "how can I solve the problem?", but "how can I delegate this task so that someone else can learn something new?". One starts to see oneself as one factor in a larger whole, the fullness of life is achieved by taking on tasks that fit into this larger context and temporarily give others the chance to evolve.

In the lives of people with great responsibility and creative work, from 55 till 60 is the best period in terms of creativity. For some people, however, doubting their former representations of values and abilities is a shock and a sign of weakness. This leads to stiffness and difficulties in relationships, as people continually try to prove that they are still up to the task, as in previous years, by sticking to their way of dealing with and resolving situations. It is a big responsibility of the management to create the opportunities for this not to happen, evaluating in time how to intervene with talks, transfers, special tasks, implementing a conscious policy, to avoid stagnating and conflictual situations.

## 2.2. The systemic-evolutionary vision of the organisation

*“The organisation is a place that becomes the means to an end or a reality where people live existence?”*

(Adrian Bekman)

*“An adult organisation is one in which people have the knowledge, skills, desire and opportunity to succeed on a personal level in a way that leads to the success of the whole organisation.”*

(Stephen Covey)

The vision of the organisation at the basis of the HOLIO methodology is based on the conceptions of the authors mentioned in the introduction and considers that, like the person, the organisation develops in phases, which, from a sustainability perspective, will lead to the definition of a mature organisation, which we have defined as “adult”. It will be characterised by the growth of the consciousness of the individuals who are part of it and by the development of the relationship with the client/beneficiary.

The organisational identity is based on its corporate mission through the products and/or services it offers. This identity lives in the sense that people attribute to their work and to what clients receive from it. The relationship with the territory can become an element of the co-creation of the organisational identity.

Organisational identity takes shape from a vision, an idea of offering a product or service useful to society to satisfy a social need. This need, such as furnishing a house or medical care, can be met in various ways.

We talk about *vision*, the idea that characterises the particular response of a certain organisation to a need, the “style” in which it is intended to satisfy it. For example, creating modern style furniture in natural materials to support the environment and give a comfortable feeling of perception of nature, or offering classic style furniture for those who appreciate certain historical styles and love their forms. This refers to the satisfaction of a certain specific target group of clients.

There is also a “how” we meet the client, so we talk about *mission*. For example, you can involve the client in furniture design and assembly to reduce costs, or you can organise elegant, targeted showrooms where the client already has everything defined and only has to choose the product.

Finally, there is the annually defined *strategy*, to make this measure real, through the definition of sustainable objectives for the organisation, trying to best represent vision and mission.

Often, however, vision, mission and strategy find it difficult to be applied in the behaviour of the employees, who do not always feel “aligned” and motivated, as they struggle to see the coherence between what is declared and what can actually be achieved in the work processes in which they are involved, given also the frequent absence of an implementation plan in which they can actively participate. For this reason, one of the greatest challenges for the strengthening of the organisational identity is to define vision and mission that are lived in the practice of a strategy coherent with the resources and working methods of the people, making them active participants.

How this challenge will be met depends on what is known as *organisational culture*, which is a key determinant of the growth/decline of companies and organisations. Edgar Schein (1985) defines it as follows:

“the coherent set of fundamental assumptions that a certain group invented, discovered or developed while learning to deal with problems related to its external adaptation or internal integration, which functioned in such a way as to be considered valid and therefore worthy of being taught to new members as the correct way of perceiving, thinking and feeling in relation to such problems”.

These “fundamental assumptions” represent what we have called the “inspiring principles” of a certain culture. For example, in an authoritarian culture, the inspiring principle is “only the boss decides”, whereas in a bureaucratic culture the inspiring principle is “I do not decide, the rules decide”.

People are not always aware of the “inspiring principles” of the organisation. This is an essential step in generating new ways of working and sometimes it is thought that change can be initiated without making old principles explicit, embodied in behaviour and visible in the form of processes. However, this is an essential step in generating new ways of working.

Individual behaviour is also guided by personal “inspiring principles”, sometimes positive for us, sometimes harbingers of recurrent criticalities, as we saw in the previous paragraph. Organisational and personal inspiring principles determine the culture of the organisation, lived in practice.

The methodology proposed in the book promotes what we have called “*culture for systemic-evolutionary development*”, which allows connecting the evolution of people, considered as a synthesis of the organisational complexity, with that of their work context, seeing in the client’s process the

ordering element and the sense of convergence between the heterogeneous variables present. The heterogeneity of the variables is an element to be considered and composed for the common purpose of increasing awareness, as pointed out by Novara (2008). For example:

- the exchange value of products and services (profit) - use value of the same (social utility);
- essential attention to quantity and cost - quality ambitions;
- emphasis on the individual (meritocracy, “status” and career differentiation) - emphasis on the collective/equalitarianism.

Many times, development attempts pass through declarations of “cultural change” to animate new strategies. It often happens, however, that the management declares that it wants to promote a collaborative organisational culture over and above the functional one, to enhance the client’s value, and then observes in practice the persistence of functional work processes and responsibilities, which do not allow new behavioural patterns.

It is not easy to move from the “what” to the “how”, it is necessary to rethink connections and ways of working, values, organisational and personal inspiring principles. Changing the organisational culture, therefore, has to do not only with new values and visions but also with the development of people, their behaviour, linked to their personal biography and the meaning they attach to their actions.

The actual organisational culture and the principles behind it, beyond what is stated, make aspects of the organisation’s identity visible to the observer/client.

Three elements can be observed:

- *physical*: the furnishings, the architecture, the type of technology, the spaces: these are practical manifestations of the actual “inspiring principles”. For example, it can be observed that in many meeting and conference rooms, especially in the scientific organizations there are no windows; they are often muffled places. An inspiring principle can be: “for research, or meetings between experts, it is good to get away from the outside world”;
- *relational*: the language and atmosphere between people, the basic assumptions or values stated as they are received, the beliefs that people automatically refer to. For example, in many companies, people do not express themselves in the presence of the boss. The inspiring principle to be observed is: “talking when the boss is present is risky”;



- *processes*: The types of processes that we can find, can be more or less fluid, in balance with respect to time, connected or not with each other and with the values declared in official documents and speeches, responding well, or badly, to the needs of the client. For example, in public administration, slowness due to bureaucracy is often encountered. It is obvious that the inspiring principle of the processes is: “my work must meet the bureaucratic needs” not the principle, which would be healthy : “first I respond to the citizen then I fix th bureaucratic part”.

The HOLIO methodology proposes to develop the perception of the various aspects of the organisational identity experienced in practice and the culture that underlies it, in order to try to transform it with respect to the primary element, the client, and to the promotion of the potential present for sustainable internal and external growth. To this end, it will be essential to see the factors highlighted from a biographical and developmental perspective. It is in the interaction with clients and their needs, in the broader framework of the territory and society, that the systemic-evolutionary vision of the organisation on which the HOLIO methodology is based is established, very close to the holistic image proposed by the ISO 26000 standard on the Social Responsibility of Organisations.

As with people, we can also observe certain phases of development for organisations.

### 2.2.1 *Development and life stages of the organisation*

Inspired by the studies of Lievegoed (1973) and the following experiments, we have defined the characteristics of three typical phases of organisational development: **the pioneering phase, the differentiation phase and the integration phase**. The HOLIO methodology is characterised by tending towards the latter phase.

The phases are to be read in relation to the change of the interactions of the people in the organisation in connection with the external element, the client, which outlines the horizon of meaning and significance of their organisational interaction. The experience that the client has when he/she enters into a relationship with the organisation.

The proactive relationship with it contributes to the generation of the social identity of people active in organisational processes.

Let's look at the three phases from the point of view of how leadership changes, how the relationship with the client changes and how internal relationships and thus the organisational culture changes.

The phases presented are not to be understood schematically, but serve as an observation point for guiding development in situations of recurring criticism which require a wide-ranging change in an organisation. Each phase represents a different working style. The structure that the organisation decides to give itself influences the construction of the processes and behaviours that animate it. Observing the organisation in the perspective of the development phases allows a systemic and evolutionary view, enabling to

“see the organisational body as a unitary reality, overcoming the traditional dis-sectioning into an abstract set of dependent and independent variables isolated from their context. This makes it possible to realistically respect the “uniqueness” of each organisation, whose historical peculiarity and current identity are irreducible” (Novara in Rizziato, 2010a).

### *The pioneering phase*

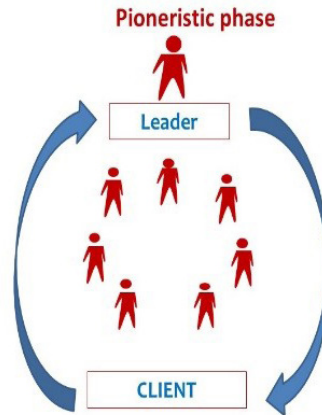
This is the initial phase, in which the entrepreneur<sup>5</sup> grasps the possibility of solving practical problems and proposes his solutions to clients, with the help of some collaborators, creating an economic flow. In this phase everything is focused on him, processes flow quickly and communication is straightforward, “everybody does everything”. An authoritarian direction and a vertical leadership style, strongly centred on the figure of the leader/pioneer, can be observed.

Internally there is a little formalisation of functions, tasks are never officially divided. In this context, internal communication is informal and very direct between people, the working style is centred on improvisation and this determines for the enterprise a great ability to adapt to changes in the external context. People can be diverse and employed in several activities, the work factor is understood as a big family, there is a willingness to serve on the part of people, strong motivation and everyone takes on board the objectives of the company, which are simple and clear.

In the market, the pioneering company shows a strong connection with the client, which is managed through personal contacts of the leader/pioneer, who however more often than not does not allow qualified internal management to develop. This results in dysfunctions which are often difficult to manage as work activities increase.

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5 But with the necessary specifications, this also applies to public and non-profit bodies.



*Fig. 2. 4 - The first phase of organisational life - Pioneering phase*

### *The differentiation phase*

When the volume of business grows, the organisation can no longer work “instinctively” and forms begin to be created, typical of pyramid-hierarchical organisation: it is specialised by function, dividing the organisational structure into offices, departments and hierarchical levels. This led to the creation of the job and the entry of managerial figures. In this way, it was possible to achieve a productive leap and initially greater efficiency. The “scientific” management of the organisation brought order and clarity to a pioneering situation that was by then chaotic and unmanageable.

In this phase, individual relationships, which were previously fluid and vital, are often lost in the anonymity of functions, management becomes distanced from the client’s process and a series of organisational pathologies are created, due to the difficulty of perceiving the organisation as a single reality, oriented towards the satisfaction of an external need. Increasingly, management loses the key connection with the client and proposes organisational solutions abstractly. Identification with the values of the organisation is loosening and there is often disinterest and demotivation, communication problems, complacency, and loss of control over processes. Processes are characterised by more formal steps related to the existence of more verbal articulation, which often leads to criticalities and decision bottlenecks. This implies that often the work, beyond agreements and

written procedures, takes different forms in daily practice trying to deal with emerging problems and that the declared organisational structure does not fully represent real life. Crisis phenomena make it necessary to think at a new shape of the organization and show the necessity of a new development phase. The limitation of the second stage is that the social subsystem of the enterprise is neglected, while the economic and technical subsystems are well developed. People start to use their creative forces outside work and the need for another phase of change emerges.

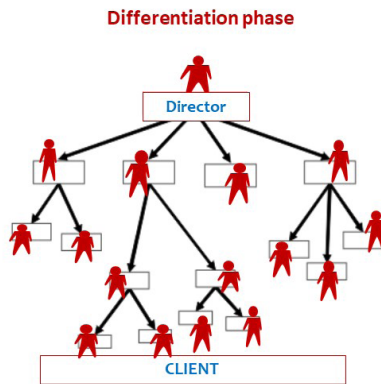


Fig. 2. 5 - The second phase of organisational life - Differentiation Phase

### *The integration phase*

It is now necessary to reintegrate the social system into the technical and economical system

The transition from the differentiation phase to the integration phase can only take place through a comprehensive rethink of the organisation.

From an organisation based on the specialisation of competencies and functions, focused on the optimisation of its internal processes, to an organisation focused on client needs, in which people and not functions become central to rethinking processes.

The question that will have to drive the change concerns the critical issues seen by the client. It will be necessary to promote a cross-functional vision, starting from top management and involving the various organisational levels. This can be done through activation of the individual entrepreneurial

spirit, at the service of the organisation, generating an “integrated organisation”, which characterises the third phase.

The integrated organisation combines a vertical dimension, characterised by the definition of goals and results by the ownership (or political direction in public sector), with an horizontal dimension, to connect goals and results with new processes able to generate added value for clients, people (in terms of learning and personal growth) and turnover.

It is a question of seeing internal processes as interconnected with the outside world, not only with clients but also with suppliers and the territory. Ownership (or political direction in the case of public institutions) should distance itself from management, with which it will interact on the basis of specific processes and working methods designed for this purpose.

The profile of the third phase depends on the size and characteristics of the organisation, the one proposed is not a rigid model but a reference image to orientate the future<sup>6</sup>. The vertical and horizontal axes are not independent but are defined in interaction processes with a horizontal community of leaders at the centre, which will manage the four dimensions defined in the figure in a generative way.



*Fig. 2. 6 - The third phase of organisational life - Integration Phase*

Moving from the second to the third phase is not a simple matter: it means transforming behaviours, practices and working styles, visions,

<sup>6</sup> The third phase was carried out in small family businesses, medium-sized companies, multinationals, public bodies of various sizes, from municipalities to provinces and governmental bodies, as well as non-profit organisations of various types and sizes, as will be described below.

perceptions of the context and oneself in the context. We will see later, in chapter 3, how with the HOLIO methodology it is possible to generate integrated organisations with horizontal leadership.

### **2.3. The generativity of development between person and organisation**

*“Often the manager has to learn to put a brake on the very qualities that enabled him/her to aspire to leadership. He has to learn to use his personality to develop, in the interest of the common, the personality of others.”*  
(Douglas Mc Gregor)

Chris Argyris (1972) has shown in his studies that organisations that are unable to meet people’s psychological needs are unable to survive for long. Agreeing with this view, the HOLIO methodology considers person and organisation as two closed and at the same time open systems, both defined by an identity element, but also interacting and co-defining. Both co-generate their own identity, which finds a healthy element in the continuous development perspective. They evolve in phases, towards an “adult” phase, in which the personal identity is realised in the social sphere and the organisational identity, as a contribution to the needs of society through products/services useful for its development.

Each evolutionary phase presents criticalities, to be read as a moment of transition towards a subsequent phase.

We know from social psychology how strong is the link between the co-creation of human individuality and the quality of organisational processes (Hosking, Morley, 1991).

There is no knowledge of social dynamics if not in a process of action involving the subject, animated by a goal of change, as demonstrated by the practices of action research and action learning (Lewin, 1972; Dewey, 1933; Kolb, 1984; Argyris, Schoen, 1998).

The latter have shown that the knowledge involved in the action is made explicit in reflection and in this way one “learns to learn”, a concept also taken up by the transformative learning practices of Mezirow (2003). In reflection, it will be possible to make sense of one’s actions and the contexts that make them possible, by integrating and evaluating them in relation to one’s leitmotif, the direction of one’s ego, whose perception will gradually become clearer.

These concepts are well expressed in Wittgenstein's phrase (1974), which represents the epistemological foundation of action research:

"It is what we do that explains the notion of identity and not vice versa. The thought tries to read itself in the actions that necessarily preceded it: actions precede awareness".

Today, more than ever, it is important to be aware of this dynamic, as technology tends to inhibit thinking, especially reflective thinking. Working in this direction is not a spontaneous process, but is an option that implies responsibility, on the assumption of which the outcome of many of the things we want to achieve at a personal and organisational level depends.

In this sense, the HOLIO methodology proposes a "humanism" in the organisation, awakening human potential in a self-determined way, but in connection with other individualities for a third purpose, that of serving clients.

Whoever acts as a facilitator of change processes has to agree that the future cannot be predicted, so it is important to make interventions in which the nature of changes and difficulties are investigated and understood by those involved, so that they become aware of the obstacles and create spaces for communication and action, reaching increasing levels of awareness, on which the development of organisations can be based.

This concept had already been recalled by Boulding's (1956) contribution to the general theory of systems, which distinguishes a hierarchy of 9 levels of systems, where each higher level integrates all the lower ones, adding a new, greater dimension in terms of differentiation and complexity.

1. The first level is that of static structures, called the structure level. For example, the geography and anatomy of the universe, the pattern of electrons around the nucleus, chemical formulas, organisation charts in companies, etc.
2. The second is simple dynamic systems with predefined movements. The added value is time. One can define the level of mechanisms. For example, the solar system is the great clock of the universe from the human point of view, but also the lever or more complicated machines such as steam engines and dynamos.
3. The next level is that of control mechanisms or cyber systems, referred to as the thermostat level. In contrast to semipolar systems with stable equilibrium, here the transmission and interpretation of information is an essential part of the system.

4. The fourth level is the “open system” or self-maintaining and self-reproducing structure. It is the level at which life begins and differs from non-life, called the cell level.
5. The fifth level has been called the plant level or social-genetic level, this system produces groups of cells according to a common purpose, something predetermined.
6. The sixth is the animal level, characterised by increasing mobility, teleological behaviour and awareness. Specialised information receptors (eyes, ears, etc.) develop, bringing an enormous increase in connections. Animals have images, knowledge of structures and a view of the environment as a whole.
7. The seventh is the human level, considered as a system in itself. In addition to the characteristics of animal systems, the human being possesses self-awareness, which is different from mere awareness. It is characterised by a reflexive quality: the human being not only knows but knows that he knows (or does not know). This characteristic is connected with the ability to speak and to create symbols. It is the only creature that is aware of time and can therefore anticipate events in its consciousness, which becomes a field of creation.
8. The eighth is the level of social organisations. The unity of these systems is the “role”, which is characterised in connection with the peculiarities of the individual: the social system is a collection of roles linked together by communication channels. At this level, one has to worry about the content and meaning of messages, the nature and dimension of value systems, the sub-symbolisation of art, music and poetry and the complex range of human emotions. The empirical universe here is human life and society in all its complexity and richness. In social systems, the person is “humanised” by being able to play different roles.
9. The last is the level of transcendental systems, also characterised by systematic structures and relations. For example, logic and axioms. It is the space for asking questions that do not always have answers.

Picking up on Boulding, Lievegoed points out that the biological object develops from the simplest global form to a pre-established final goal, the adult form of the species, which is present as information from the beginning. The same cannot be taken for granted for an organisation. It can



be considered on a par with a natural biological organism, as long as we are aware of the major difference, namely that its “cells” are autonomous individuals, endowed with free consciousness, unlike the cells of a biological organism in which the “final project” is written.

While in the biological object the goal of evolution is the adult form of the species, in the social organisation the “adult” form is a prerequisite and a means of achieving an objective outside the system, i.e. the product or service offered to society; this objective remains throughout the various phases of the organisation’s life and will only be attainable if it is perceived and consciously pursued by people at all levels, with a drive for the initiative. It will be necessary to bring together personal judgements and points of view, and to address critical issues more consciously.

An “adult” form of social organisation at the eighth level of Boulding is, therefore, one which can realise what is new, special about it: to generate a shared value system and to become “fully human” in pursuit of a common purpose. The two goals will be possible in connection with the development of what is peculiar to the 7th level, namely human consciousness.

While one speaks of growth and maturation for the various biological systems, for the human being, characterised in relation to others by self-awareness, and for the social systems created by him, more appropriate terms are therefore change and development. The development of human identity as a striving for self-realisation and the development of organisational identity as a contribution to society, in terms of products/services, should therefore be seen as two strongly interconnected realities. This is also emphasised by Luhman (2001) and Parson (1991), for whom social systems differ from biological systems in that they are constituted and organised on the basis of meaning and are held together by symbolic processes, capable of providing decision-making indications and criteria for mutual orientation in the awareness that “everything that is said is said by an observer” (Maturana and Varela, 1987).

Since organisational contexts are highly complex, abstract methodologies that break down the reality of the person at work and the reality of the organisation that contains his or her work should be avoided in order to make development concrete (Novara, 2008).

It will be essential to activate people by adopting an exploratory and experimental approach, also because, as Drucker brilliantly points out: “Management by objectives only works if you know the objectives. Ninety per cent of the time you don’t know them”.

The new convince, as was the case with Olivetti Company, if it is developed in careful experimentation, contained in an appropriate sphere (a department, a small group), before being extended to other spheres, guided by evolutionary hypotheses, punctuated by checks on the progressive results: these checks lead to experiences of “short-term success”, necessary to motivate and make the action continue towards a final outcome which is not forthcoming (which cannot be pursued serenely if there is no confirmation of the validity of the effort).

By participating in the experimentation, people experience the double role of functional and controllable parts of the system and experimenters of the system. After all, the Action Learning initiatives have proven that “acting, reflecting and learning are inseparable”, that innovation is “learning by doing in action”. It is, therefore, necessary to activate and involve the staff to explore and test possible solutions and to start a process of individual knowledge and development.

Particularly inspiring in the development of the HOLIO methodology was Bekman’s (2007) Methodology of Evidence. He believes that the use of the typical approaches of the natural sciences and their assumptions, in the context of the research should be reconsidered. This methodology, which is suitable for “systemic connections”, considers that social reality is expressed in “evidences”, which manifest themselves in “social questions”. It is up to us to begin to understand the language of social reality by trying to grasp the complexities involved. To this end, both elements of the natural sciences, characterised by data, facts and numbers, and those of the humanities and social sciences, which consider narrative, imaginative elements linked to the interrelationships between individuals and groups, should be taken into account.

Bekman’s Methodology of Evidence espouses a multi-disciplinary perspective, highlighting 7 characteristics and ways of investigating organisational reality:

1. **Dialogical:** social reality should be explored in dialogue with those involved in the work process that is to be improved.
2. **Cyclical:** critical processes are repeated, manifesting themselves differently over time.
3. **Biographical:** Organisations are to be regarded as living organisms, created by human beings, with their own biography.
4. **Phenomenological:** it is important to refer to observable facts

that must be highlighted, ordered, documented, and constitute anchor points for the description of the criticality to be addressed.

5. **Narrative:** it is good to work with people in the organisation connected to the need for change, asking them to describe events, anecdotes, conflict situations; the images evoked lead to other images, creating scenarios useful for assessing the concrete steps to be taken;
6. **Symptomatic:** by focusing on what is not directly observable, but manifests itself as a symptom, it is possible to highlight relevant aspects in which essential elements of organisational life emerge and to glimpse possible scenarios for change.
7. **Empirical:** by verifying with the people involved in the critical situations the facts and data collected in connection with them, a shared question for development can be arrived at.

It is not easy to value all these elements and it is very difficult for a detached observer, a consultant who thinks to “solve” the criticality, to do so. Instead, it will be necessary to activate the people affected, helping them to explore implicit and explicit assumptions in depth. It is a question of favouring a sort of “autopoiesis” of the system through the activation of people with what Lievegoed has defined as a “moral technique”, aimed at making a given context the best that it expresses as potential. To this end, the HOLIO methodology proposes a rhythm between the definition of a personal “next step” and an organisational one as an effective driver of change. It allows the verification of ideas, evaluations and judgements, widening the spectrum from initial positions, gradually generating change.

It can be observed that perceiving the sense of work and thus the organisational identity is not a matter of course. It is a key element of work motivation, as well as the ability to make a personal contribution to the development of work processes, as highlighted in chapter 1. If one wants to start a sustainable development, both for external and internal stakeholders, it is, therefore, fundamental to start paths that enhance the attribution of the meaning of organisational life to promote new and better organisational behaviours. This can be done retrospectively, with practices of reflexivity (Weik, 1997; Kolb, 1984; Argyrys, Schon, 1998, Schön, Striano, Capperucci, 2006; Mortari, 2004; Knowles, 1996; Formenti, 1998), but also in a future- and present-oriented way, as proposed by the HOLIO methodology, which combines the three dimensions of time rhythmically, proposing learning on three levels: from reflection, from prospection and from action.

Learning is based on an awareness of the systemic-evolutionary connections between:

- the principles behind critical issues and new organisational processes, taking into account the impact on the client.
- the principles inspiring our actions and their concrete effects, considering how we observe and perceive reality, how we represent it with our language, how we construct our opinions and judgements, how we attribute meaning to things and define our actions<sup>7</sup>.

An effective way will be to start observing the disconnections that create problems for the client's experience of the organisation and to learn to read them not as a "problem to be solved" but in terms of "development question". Formulating the right development question leads us to work on a meta-level, leaving behind the subjective dynamics of judgement on the criticalities observed, which are often limiting. This is the way to open up a participatory, dynamic and generative process which will lead to overcoming the criticalities which have emerged and to developing the people who have worked in this direction.

The HOLIO methodology proposes innovative and effective practices on this point, as described below.

Fundamental is the direction, the sense of change. To be concerned only with the achievement of immediate goals does not create any participation, motivation or morality.

Companies that, instead of making added value for the client and product/service improvement a point of orientation, are interested in short-term profit for financial/speculative interests, use their employees by depriving their work of meaning, perspective and development opportunities, creating pathological relationships within the organisation. In this way, the substance of the organisation is destroyed for the sake of interests that do not lie with

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<sup>7</sup> The interrelationship between language and thought opens up an interesting area of self-development, linked to organisational development. Exercising awareness of this interdependence is an important element of self-awareness. Vygotskji (1962, 1978) was the first to investigate how language expresses "external speech", but there is also "internal speech", and new concepts develop in the relationship between the two. Internal speech is qualitatively different from external speech. In the mature form, internal non-verbal speech is comprehensible to everyone except the subject himself and does not resemble verbal speech, as it is composed of verbs and very compressed. Speech to oneself, from an infantile activity, gradually becomes a means of regulating behaviour. The child begins by speaking out loud on its own and then internalises the speech. Thoughts are mediated by the semiotics of internal speech. Thought can exist without language, but with the mediation of language, it develops to a higher level of sophistication.

it. Without meaningful direction, it is impossible to move organisational complexity in an evolutionary and sustainable direction.

Organisational systems created by human beings need morality. In natural systems, we can observe an implicit morality, a “sense in itself”. In the social systems we create, we have to generate this morality together: suppliers, clients, colleagues, managers, we are all involved in interactions that we have to make sense of together.



### 3 - HOLIO methodology in practice

*“A weak point in the approaches of change experts is that the inner world of people is hardly invigorated. They are always busy changing external circumstances and are surprised that nothing significant changes in people’s processes and behaviour. Organisations are restructured, new buildings are taken, new systems, slogans, missions are adopted and people continue to behave in their usual way.”*  
(Adriaan Bekman)

#### Foreword

Based on the theoretical and visionary assumptions outlined in the previous section, the following describes how they can be put into practice, highlighting the steps of the HOLIO methodology.

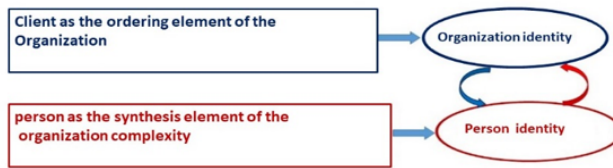
The key issue is: what connections should be made to initiate forms of development that enhance the meaning of organisational life and thus bring meaning to the lives of the people who work there?

The approach will be exploratory and experimental to generate change in processes and behaviour. It will lead to abandoning the culture of quick answers and solutions, which are often reductive with respect to the complexity of reality, to focus on defining those questions which are really at the heart of the criticalities of organisational life, trying to formulate them appropriately.

Central to the various steps will be the definition of the **next step**, as a key element for exploring and transforming reality. As already highlighted above, the HOLIO methodology is part of action science, applying Luhman and Parsons’ systems theory to the organisational field. It, therefore, proposes to connect self-awareness in interpreting and transforming organisational reality in a sort of personal and collective autopoiesis. In the systemic-complex and evolutionary vision of the organisational reality, the person becomes the synthesis element of the complexity, while the client is the ordering element.

The organisation conforms to us with respect to our personal identity, but we also conform to the organisation through the processes in which we work and in which our mental constructs and ways of relating are imprinted.

Creating the right connections means working on both levels, to generate the organisational identity consciously, in parallel to the personal identity. People, at different levels, will have to take a path of personal development, intertwined with the organisational one, to focus on which connections to start and how to do it.



*Fig. 3.1 - Connection between organisational and personal identity*

For example, the corporate vision and strategy must be connected to the design of activities that realise it, involving people and accompanying them in their areas of improvement; the evaluation of performance must be connected to the achievement of agreed development goals and the definition of the conditions of feasibility; the creation of added value for the client must be systematically linked to the development of the capacities of those in contact with the client to observe areas of improvement and to be able to report them as input for the development of organisational processes; the definition of the budget must be generated by the top management across functions, focusing future activities on added value for the client.

The overall objective must be to achieve a harmonious development between turnover, clients and employees with positive effects on the territory.

Two steps are needed to create the right conditions for this:

1. **Define the setting for systemic connections:** work with management to define an initial framework of change needs and design a “horizontal space” as a development infrastructure for systemic connections.
2. **Implementing the generative development pathway:** the development infrastructure will be accompanied by a cyclic pathway for horizontal leadership and integrated organisation (TRASE - Systemic Evolutionary Training): this will train skills that will lead to new processes and competencies.



To understand the two steps described, it is important to clarify the differences between some of the process definitions that will be proposed:

*Work process*: a set of interrelated activities that create value by transforming resources (input) into a product/service (output); it is functional/vertical in nature.

*Client process*: the experience the client has when coming into contact with various parts of the organisation; it cuts across several work processes.

*Development process*: the purpose of the development process is the evolution of the organisation and is how work processes and the habitual behaviours that characterise them are changed so that they ensure the creation of value within the client process.

The person who accompanies the pathway cannot be defined only as a consultant (or trainer), we prefer to call him/her a “development partner”: he/she will in fact act as a horizontal leader. He/she should therefore have already acquired the horizontal leadership competencies which are one of the outputs of the HOLIO methodology<sup>1</sup>.

### 3.1. Defining the setting of systemic connections: the development infrastructure

*“Knowing is not enough; we have to put into practice  
what we know. Neither is wanting enough;  
we have to do.”*

(Johann Wolfgang von Goethe)

The frequently encountered situation is that of second-stage organisations at different levels of complexity, structured by functions, which show clear signs of disconnection between the parties and fragmentation of the client process. It also happens in pioneering and unstructured contexts that the vertical dimension, be it formal responsibilities, specific talents, acquired roles, creates processes and working methods that present criticalities.

The first step to take with management will be to help them reflect on recurring critical issues and their impact on the client process.

It will be needed to extract the development questions helping the person to come out from his/her representations but to stick to the facts and concrete examples.

The dialogue with the interlocutor will not be of the problem-solving type, but of the maieutic type: the aim is not to propose immediate solutions, but to focus on the vital connections missing in the organisation.

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<sup>1</sup> See chapter 5 on horizontal leadership competencies.

To avoid self-referentiality and reductivism with respect to the current critical issues, an appropriate *horizontal space* will be created across functions and hierarchies.

This is the *development infrastructure*, consisting of the first community at a managerial level, transversal to the functions, and a second one, composed of selected figures (the developers), transversal to the sectors and hierarchical levels, who will take the leadership of the questions to explore them with the working community, generating development processes.

The two communities will work together on issues of change in a new dimension of responsibility, as horizontal leaders, to initiate processes in which the client is the driving force behind the activities and people find areas of personal development.

In particular, developers should be active in exploring questions of change by involving colleagues affected by the criticality, while managers will focus development questions more on a strategic basis.

The criteria for defining the community of developers will not be based on hierarchical logic or particular expertise in a certain sector related to the question, but will focus on the type of personality and professional biography suitable at that moment to take up the “challenge of change”. These are people with talents to orientate themselves in the new, to create different paths, to confront creatively with criticalities and various stakeholders, drawing development opportunities with respect to the client, the company’s results and colleagues. The community of developers will also be able to express their own *development questions*, which will be cross-checked with those of the managers, defining their priorities and relevance.

After having created the two communities, it will be necessary to establish a time and rhythm of work, to create the *development infrastructure*, in which one will work systematically with the two communities both separately, to propose the systemic-evolutionary vision and practice of the organisation and its people, focusing on the peculiar needs of each group, and in connection, to support the change in an exploratory and experimental way before going into full operation. This will mean focusing on the “next step” and then reflecting on the outcome and re-orienting the action.

The *development infrastructure* can thus be defined as a trans-hierarchical, trans-functional process of space, time and rhythm consisting of systematic *connection meetings*, with an established rhythm.

This will make it possible to work outside the logic of the ordinary, which is often at the root of recurrent criticalities and the organisational culture that has generated them.

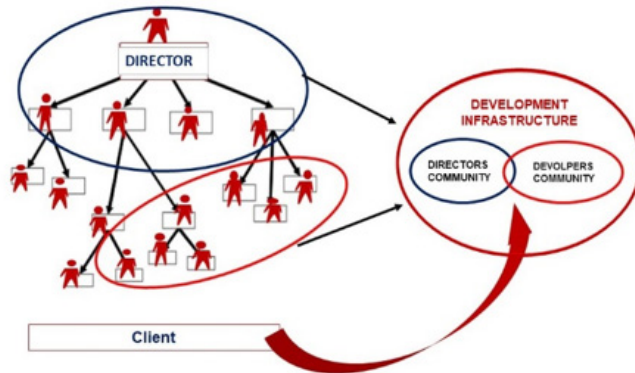


Fig. 3.2 - From the second to the third phase of organisational life building the development infrastructure

In the development infrastructure, it will be possible to evaluate, from time to time, the need for changes from a systemic-evolutionary point of view, always focusing on the creation of added value in a harmonious way for: people, client, turnover, territorial context. In figure 3 below an example of the time and rhythm of the development infrastructure for 4 months.

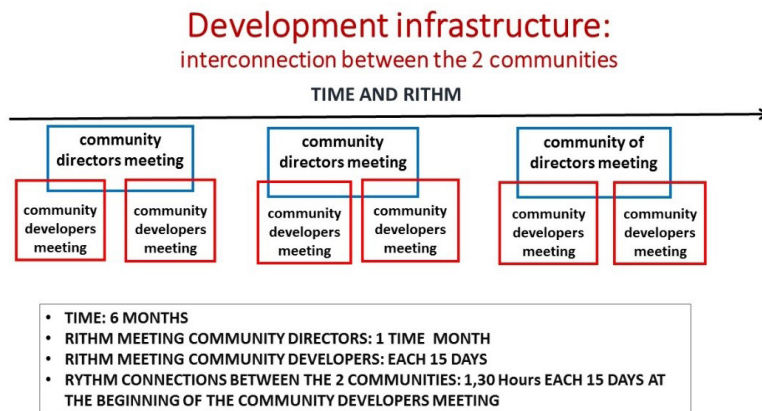


Fig. 3.3 - Example of time and rhythm of meetings in the development infrastructure

Obviously, the definition of time and rhythm depends on the specificity of the organisational reality and will have to be set up with the managers according to the specific needs. General guidelines are given here, not a rigid and defined model. It is an “art of change”, not a technique.

Particular care will be given to the connection meetings: initially supported by the consultant, they will have to be managed in rotation by the participants in the path of change, to learn how to make the meetings effective, estimating an active and conscious presence to arrive productively to the definition of the next steps. The meeting should consider three elements in a balanced way:

- content: sharing of exploration/experimentation results;
- interactions: suggestions for dealing with explorations/experiments;
- defining next steps: helping who have the leadership of a question to define what to do before the next meeting.

The dialogue should be aimed at supporting the colleague with conscious and targeted feedback so that he/she can realise a “next step” in the process he/she is leading. There will be no room for discussion, but only for essential dialogues aimed at systemic development, for which everyone has to work on his or her self-discipline. The exercises in the pathway, described in chapter 4, will be of great help here. They aim at creating an “intelligence of action” in a complementary perspective to the classical analytical approach, which is often abstracted from real situations and possibilities of change.

The following are the elements that will characterise the development infrastructure:

- the culture of systemic-evolutionary development and new inspiring principles (3.1.1.);
- development questions as systemic questions (3.1.2.);
- the “horizontal space”, as the space of connections (3.1.3.).

### *3.1.1. The culture of systemic-evolutionary development and new inspiring principles*

After designing the development infrastructure, it will be crucial to define and share the new *culture of systemic and evolutionary development*, differentiating it from that of ordinary management. It will therefore be important to finish the new “work inspiring principles” to generate

horizontal leadership and integrated organisation. In the most general formulation, they will be the following:

- the client is an element of identity and meaning of the organisation;
- work processes are rethought on the basis of clients' needs, horizontally, across functions;
- we work to create added value on 4 levels: clients, people, capital, territory;
- work in a generative way of change with an exploratory and experimental approach before going up to speed, defining a rhythm;
- everyone is a horizontal leader and as such generates new processes, new behaviours and ways of relating;
- the needs for change in processes are explored by reflecting step by step also on areas of personal development to focus on the unconscious inspiring principles of one's own behaviour and to transform them.

Each horizontal leader, during the exploration of the question, will then be called upon to identify the inspiring principles of the processes that are no longer compatible with the necessary developments, to highlight and transform them with colleagues: the new inspiring principles, which will be shared with the working community, will highlight the paradigm shift and the new organisational culture that is being generated. As far as processes in second stage organisations are concerned, the principles that inspire them are often linked to various forms of internal rationalisation, forgetting the creation of added value for the client. People also tend to think in that direction, losing the purpose and the overall view of the meaning of their work. If you want to move towards a third phase organisation, an integrated organisation, you will focus on creating horizontal processes, in which the client is present at all stages as an element to be added value. It is a question of changing the logic from the "work process" to the "client's process".

Below are the typical characteristics of the work process and the client process with respect to the inspiring principles behind them. They represent the "implicit sense" of how one works. It should be made explicit if the working community is to gradually change the old principle into a new one in its behaviour.



*Fig. 3.4 - Principles inspiring the working process and the client process*

Often paths of change are initiated without observing the level of the inspiring principles that led to the critical points to be changed. It also happens that new inspiring principles for a change of culture are stated, but then no concrete work is done to implement them in the practice of work behaviour. This is a key aspect in which it can be observed that people are the synthesis element of complexity: it will be the developers who will highlight how principles to be changed live in processes and behaviours, activating themselves and their colleagues in generating a new culture lived in practice.

### Example of Inspiring principles

In a municipality in the province of Rome with more than 130,000 inhabitants, one of the processes in charge of a developer concerned the client category (citizens) “disabled persons” for whom the municipality provides various services. One of the most critical issues identified was the delivery of the parking card, which took a long time for the applicant who had to visit the town hall offices several times. This created constant complaints.

The client's process started with taking the application to get the parking card and ended with its return, with bureaucratic steps in between, involving various offices. In fact, the submitted application was going round and round between offices of different administrative functions, slowing down the time enormously and involving at different times the disabled person who had to go to different offices of the municipality, located in different parts of the district. The developer in question realised that the inspiring principle of the current work process was: "I organise myself according to the bureaucratic-administrative needs of my function". After exploring the various criticalities, he pointed out to the community of directors that he could not proceed further in development unless he was given extra-functional responsibility, which he was. Thus, he was able to redesign a new process with the people involved from the offices of the various sectors, which was much faster, tested and then brought up to speed. It shared upstream with the testing group the inspiring principle that should characterise the new process, with the collaboration of all. The principle was: "we work to respond to the client with a handicap in the shortest possible time with maximum logistical facilitation". In doing so, each participant in the definition of the new "client process" rethought his or her working behaviour and connected to the new process. This simplified the interaction with the client (disabled person), who can now refer to a single counter.

### 3.1.2. *Development questions as systemic questions*

The focus on development questions is a characteristic element of the methodology for horizontal leadership and integrated organisations: they are understood as an open and dynamic reading of the criticalities of the client relationship and the change strategies of the organisation.

To characterise them, let's look at the types of questions that can be encountered in an organisational context when faced with a criticality: questions of knowledge, problem solving and development.

#### *Questions of knowledge: why does it happen that...?*

They lead to a focus on an alleged problem and to the classical analysis of causes, which aims at defining a detailed picture of the situation of a rational and "objective" type. E.g. "Why is there little participation of colleagues from the various sectors in the definition of training activities?" They are past-oriented. Normally they follow analytical paths to find an "answer-solution", whereby information is collected, often "abstract" data with respect to

the real people and processes which have generated them with unlikely realisation in reality. What is planned with the analyses is hardly applicable in practice, as there is a lack of perception of dynamics and connections which no analysis can show.

*Problem solving questions: how can the problem that has arisen be resolved?*

These are questions which may be appropriate in situations where the variables are known and there is no need to act on changes in culture and working style. They are oriented towards the present, it is about maintaining the ordinary if it is satisfactory. E.g. "How to find the best printer for our programmes and office network?" The consequence will be a technical analysis followed by a technical choice. Often the emphasis on problem-solving is used to solve critical issues in which non-technical variables are also involved, i.e. relational or the design of work processes and improving the effectiveness of organisational action. In this case, the reduction of complexity causes that instead of solving problems, they are only moved from one place to another, leading to recurrent critical situations. It will therefore be useful to move from problem-solving to problem-setting, to an awareness of the scenario, and then to set in motion appropriate paths. For example, when faced with the criticality of the relationship between the people in the various departments, the question is often asked: "what intervention with the staff can be activated to improve the relationship between the departments?" In reality, this question already contains a solution which reduces the complexity, in the belief that working on people can change relationships. Many courses on motivation, collaboration and communication have been made for this, neglecting the fact that relationships occur in a type of processes which are often the main cause of the difficulties experienced. Also here one can find a reductive view of organisational life based only on relational modes, losing the purpose, which is visible in processes that have to be connected to each other according to a well-defined meaning and strategy.

*Development questions: how can I act to overcome a recurring critical situation?*

This type of question refers to situations in which there is a recurring criticality which has not been resolved so far and which calls for a general rethink of the work processes and the way of relating and connecting. They are therefore future-oriented questions. They can be defined as "systemic"



because they call for a series of connections, they are open and need to be redefined with the people who experience critical issues at work. Often the development questions are presented broadly and generically and are linked to the level of awareness of the person formulating them. They should therefore be oriented towards concreteness, starting from the real situations that generated them, so that those who formulate them are not anchored to an abstract context, but have in front of them a concrete image of what needs to be transformed.

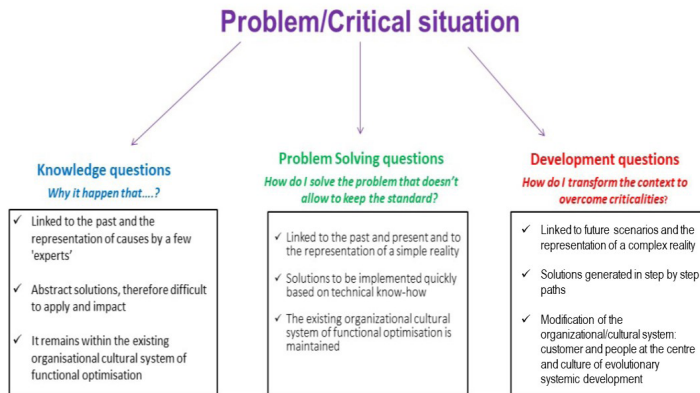
For example, with reference to the critical issue mentioned in the section on problem solving questions, concerning the problematic connection between departments, the effort should be made to see the issue in relation to the client experience. The development question could then be: "How can client interactions with the organisation be improved?"

In order to work properly with the development questions, it will be necessary to help the interlocutor to "see better" the criticality he/she wants to face, so that he/she can reformulate the question and glimpse the possible evolutions and connections, differently from what we normally do, trying to give an answer. After an initial work of formulation and reformulation, which allows to catch a glimpse of exploratory steps, it will be necessary to investigate the question with whoever is touched by the criticality and to verify it, if necessary re-orient it, collect data and facts concerning it, focusing on possible inspiring principles to be changed. In this way, the question starts to connect to the elements that generated the initial criticality.

As a consequence, a concrete and shared definition will be reached, from which possible improvement processes can be started, which will have to be tested with a group and in restricted areas before becoming fully operational.

A summary of the three types of questions is given in Figure 5.

It is therefore important to be aware of what question is being asked when one is faced with a critical issue at work and the glasses through which one is looking at it, avoiding reducing the complexity of the context.



*Fig. 3.5 - Types of questions in organisations*

### 3.1.3. Horizontal space

The horizontal space represents the dimension of the development infrastructure. It is a space in which one works out of the ordinary, with different roles and responsibilities, linked to change. The logic will be that of reciprocal support to activate their leadership, characterised by a new language compared to the usual one.

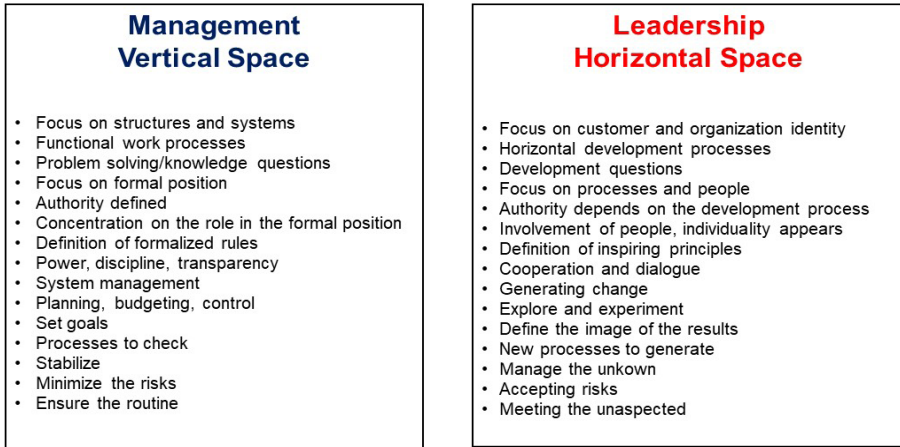
They will talk about development questions and processes, the client process, inspiring principles, exploration and experimentation, generativity, culture, people and individual and collective meaning.

It is good to be aware of the different characteristics of the “horizontal” space, linked to the dynamics of development and leadership logics, compared to the “vertical” space, linked to the management of the ordinary with management logics. This is summarised in the table below (fig. 6).

Both dimensions are present in organisations and have to be managed with awareness and appropriate skills.

Thus, alongside the ordinary life of organisational work, there will also be an evolutionary life which, by questioning the meaning and effectiveness of the former, will put it “in motion” with respect to the identity given by its “social mission” thanks to the activation of people, as will be described in the next paragraph.

## Spaces of the organization



*Fig. 3.6 - Characteristics of the organisation's "spaces"*

Change requires managing the ordinary while working on development. The community of directors is therefore required to make an effort to act out their managerial role, to manage the ordinary, in parallel with the horizontal leadership role, which confronts people from the development community, also as horizontal leaders. While in the ordinary role the managers give directions in the work, in the development role as horizontal leaders they are called upon to support the initiative of the developers by supporting their areas of improvement in a "horizontal" relational mode, i.e. of co-creation, which therefore also refers to their personal areas of improvement. They thus experience a "learning by doing in interaction" co-generating development at various levels.

The horizontal space, represented by the development infrastructure, will come to life according to the established rhythms of encounter, in the cyclic TRASE (Systemic-Evolutionary Training) path, described below, in which specific skills for systemic connections will be trained.

## Example on development questions as systemic questions and of creating horizontal space with the development infrastructure

In a company in the automotive sector, with several locations in Italy, it was initially expressed by the management the need to have more participation from the staff. In one of the main locations, they had been experiencing for a long time the obvious difficulty to break the established boss-employee relationship, which had generated a passive, merely executive attitude on the part of the workers. This made it difficult to grow the company as planned in the annual strategy. The management, consisting of 6 managers and a general manager was looking for a way of working which could change the hierarchical-functional patterns and in the first meeting with the consultants they expressed the question:

*How can technical staff be made more proactive?*

The formulation shows a one-sided aspect of the problem, which is perceived as only related to the attitude of the employees. Trying to broaden the perspective and perception of the facts, concrete examples were asked for, trying to visualise the critical issues.

From the examples and reflections that emerged from the facts recounted, it was perceptible that attention had to be shifted to the working conditions and the missing links with management. The question was therefore reformulated:

*How to create the right interactions between management and technical staff to start a process of accountability on recurring criticalities?*

In order to highlight the type of missing connections, we, as consultant, explored with the directors whether and how the vision and strategy of the year, which set targets for increasing client types and sales results, was clear to the employees. It turned out that a vision talk had never been given to the staff and that there was no client orientation at all in the working interactions (one technician explicitly said that for him the client is the engineer who gives him the production lists).

The definition of the strategy and its objectives had always been decided only at the management level, and with little generative logic: the company experienced a strong engineering, vertical culture in which the command-control principle predominated.

The directors and the general manager were aware that with this organisational and relational set-up it would have been impossible to achieve an increase in production quality, also given the previous attempts with some courses on motivation and collaboration which had not had the effect of making the workers, especially the technicians, more responsible.

The second question then saw two reformulations:

- 1. How to involve workers in the annual vision and strategy?*
- 2. How to create an environment in which staff can take initiatives without losing control of the situation from management?*

Working on the first question, again referring to concrete facts and pictures of situations that made the criticality evident, it emerged that the definitions of vision and strategy were done in a fragmented way, with little connection between departments. The focus of the question, therefore, shifted to managerial competencies, which were not well suited to renewal. The question was therefore reformulated:

*How to create a shared vision in strategic planning between departments on the quality standards to be achieved for the final product?*

This question gave rise to specific work to generate horizontal leadership competencies with the group of directors. The preparation of the vision presentation was the occasion for the first moment of cross-connection and learning on horizontal leadership competencies among the directors who were supported in group work. The presentation of the vision was articulated on three levels: content, involvement and concreteness, so that the developers could feel part of a change process which was governed, but not managed in detail, and where their active collaboration was required in view of a common client vision and strategic objectives. In the work with the directors, some of the exercises described in chapter 4 were used. This step had never been done before and was essential to involve the developers to feel part of an overall design. For the directors, it was an element of strong cohesion and optimisation of strategic objectives as well as learning how to inspire with a development vision.

In order to work on the second question, the consultants shared with the group of directors the need to create a new kind of setting, a “horizontal space” as a development infrastructure, in which to start connecting with the workers in a different, more interactive way, aimed at generating a shared perception of the relationship with the client. The aim was for everyone to be able to contribute in a personal way to the realisation of the strategic objectives, but also for their definition to be fuelled by concrete possibilities resulting from the interactions generated in the new context. The question therefore became:

*How to create a development infrastructure so that it is an opportunity for a cultural change of staff, but also for starting new processes in response to the annual strategy?*

The focus was then on how to create the group of developers, to start the change in the most productive way: the most suitable people were chosen, according to non-hierarchical but individual parameters, and then the whole working community was involved. The two groups were created: the community of directors of 6 people, including the general manager, and three groups of developers, each of 15 people.

It was proposed to define a rhythm of work and connection meetings between the two communities to guarantee the control of the situation for the directors, from an overall point of view. The development infrastructure was defined with a rhythm of meetings every 15 days for the developers, every month for the directors, and for the interconnections 1 hour every 15 days, at the beginning of the work with the developer community. The whole process would last for 6 months.

It was also agreed that the two communities would work on focusing on new visions and readings of the company, new skills, new development processes. It was intended to promote cultural change. The new inspiring principles to be shared would be:

- *we all work in a client process that we share*
- *we work step by step exploring and experimenting to transform our interactions and be able to take shared development initiatives*
- *we work on the contextual development of our horizontal leadership skills*

- *we work with an established rhythm for the development infrastructure.*

The directors' community then formulated the following questions. For itself:

- *How to support technicians and chief technicians in a transition to autonomy with respect to criticality management in the wards?*
- *How to generate shared visions and practices between departments with a client focus?*

For developers (only a few are given as examples):

- *How to increase productivity by redefining the schedule of day/shift/worker activities (with a view to balancing the distribution of the workload)?*
- *How can methods and procedures be streamlined to reduce the time taken to issue test reports?*
- *How can downtime due to malfunction problems be reduced?*

The first step in the creation of the development infrastructure was the presentation of the vision by each director to the developers, focusing on the quality development needs of the clients and the numbers the company needed to achieve. The community of directors then presented to the developers the co-ordinates of the working path as development infrastructure and its inspiring principles. Finally, development questions were proposed for which they were invited to take the lead (preliminary interviews were held with some). In order to give substance to the concept of "horizontal space", the group of developers was then asked which other development questions they felt they would like to propose from their point of view.

From the crossing of the two groups of questions (directors and developers) and the final developer-question identification, the pathway that will be described below (the TRASE pathway of systemic-evolutionary training) started.

Here are some of the questions expressed by the developers:

- *How can we improve the handover at the end of the shift?*
- *How to create a process between shifts to define the workload optimally?*

- *How can the flow of priorities be improved to avoid task orders arriving from several fronts?*
- *How can the organisation of the tests be improved according to the ratio of number of operators/activities to be carried out?*

The evaluation of the developers' questions by the community of directors was an opportunity to perceive the experiences and points of view of the technicians and provided important ideas for the overall definition of the final set of questions on which to start the development process. The total number of questions resulting from this first phase of work was 40.

### 3.2. **Realizing the generative development pathway: TRASE - Systemic-evolutionary training for horizontal leadership and integrated organisation**

*"The way you see people will influence the way you  
treat them and the way you treat them  
will affect what they become".*  
(Peter Druker)

After defining the development questions, the inspiring principles of the new organisational culture and the timeframe and rhythm of the development infrastructure, it must now be made operational in an exploratory and experimental process before being full-scale.

The aim is to evaluate the ways forward step by step, outlining and testing new paradigms and possibilities. The questions identified will be explored by sharing them with those affected by the critical issues and transformed into processes, involving small parts of the organisation in ad hoc experiments. This type of approach is an essential condition for managing complexity. To this end, in the path will be trained specific skills on the basis of horizontal leadership, which is characterised by the double value of self-leadership and leadership of processes in which people can be responsibly activated for a common goal. The proposed path, called TRASE, *Systemic-Evolutionary Training* (fig. 3.7) underlines the concept of "training", which allows transforming personal constructs and behaviours while generating new processes.

In the TRASE path it is a matter of putting into practice what has been decided and pre-set as a way of working and direction for development.



The two communities will start the generative path of change, which will take into consideration at the same time the development of organisational processes, focused on the identity given by the client and the development of the professional identity of the employees, trained to be horizontal leaders.

A fundamental element on the part of those helping the organisation will be to stimulate the spirit of initiative to make the initially outlined intentions operational.

The path will take place in two macro-phases, each characterised by a transformative learning process:

- the exploratory macro-phase;
- the renewal macro-phase.

Transformative learning focuses on promoting systemic connections between personal development and that of the organisational processes, as explained below.

TRASE will have a cyclical character both within the macro-phase exploration and in general: it will start from the identified development questions which, after being explored, will lead to new processes, first experimental and then full-scale. Thus, a first cycle will be completed and it will be possible to work at the same time on the emergence of new questions, initiating subsequent cycles, generating a culture of systemic-evolutionary development which is increasingly widespread and experienced in the organisation.

The two phases and the transformative learning process will take place alternating between classroom meetings and experiential moments in the workplace (fig. 8). The classroom meetings will be of two types:

- meetings aimed at defining a next organisational step;
- meetings aimed at defining an individual next step.

In the first case, the systemic-evolutionary vision of the person and the organisation will be shared, as well as the related synergies, which become possible if each one activates and practices as a horizontal leader. Critical organisational issues will be explored in the context of past biography and future vision. The proposed inputs are then transferred to the concrete situation of each individual through group work with context-specific exercises and the aim of defining a “concrete organisational next step”.

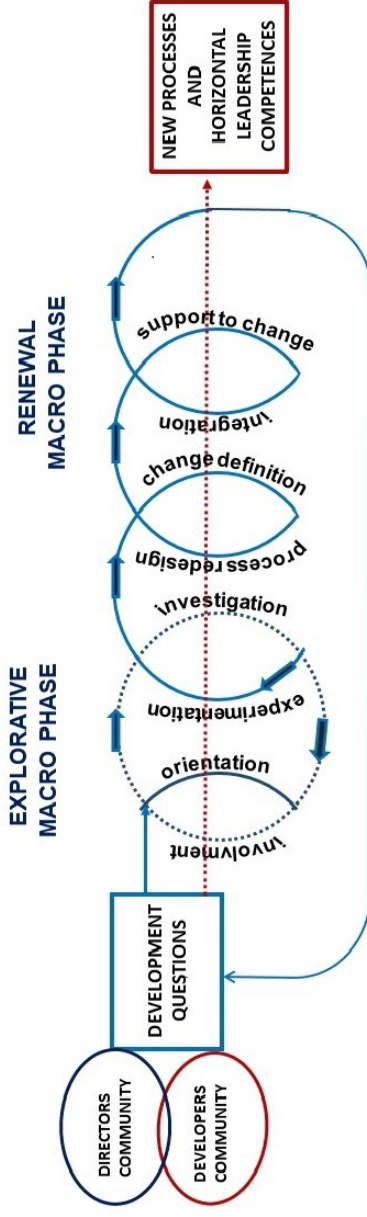


Fig. 3.7 - The cyclic pathway for horizontal leadership and integrated organisations (TRASE - Training systemic-evolutionary)

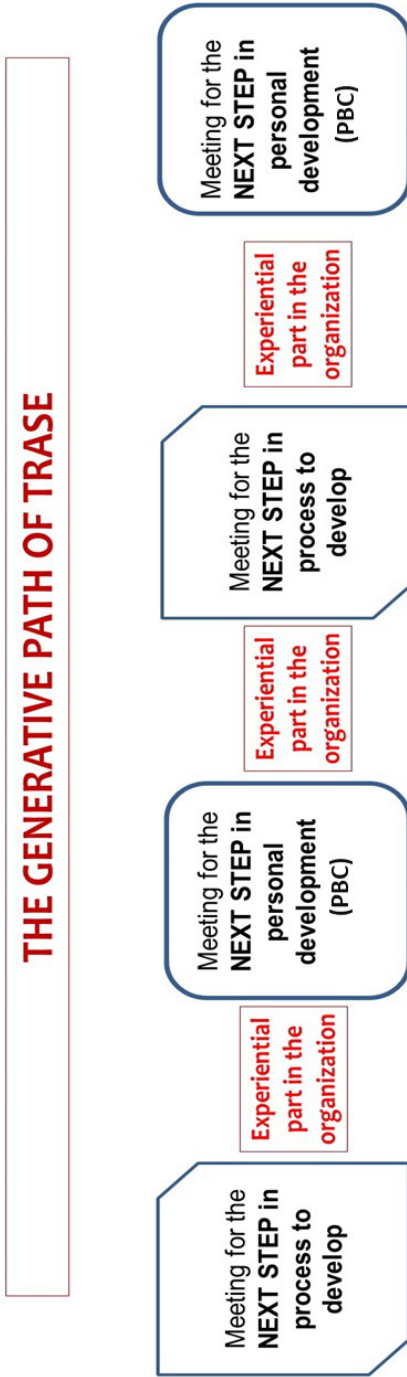


Fig. 3.8 - The generative structure of the cyclic path TRASE

In the experiential moments in the workplace, the step established in the classroom meetings will be realised. Its outcome will be crucial for the next meeting and the generativity of change.

In the second type of meetings, one can reflect on the outcome of the step taken, also in relation to one's own areas of improvement, leading to the definition of a "next concrete step of personal development". Personal biographical dimensions are explored in relation to the characteristics of one's mental, emotional and action structures, as well as the dimension of one's own leitmotif. With the proposed exercises people learn to help each other by practising what we have called *Professional Biographical Coaching* (PBC). It consists of a combination of some types of exercises described in chapter 4. If necessary, the consultant will also activate personal PBC sessions. It has to be specified that this is not an analytical way, but a re-reading of the evidence expressed in the experienced criticalities.

Let us look in more detail at the two macro-phases and the transformative learning pathway.

**The exploratory macro-phase** is divided into:

- an orientation phase of development questions and involvement of key actors;
- a phase of investigation and sharing of possible changes and experiments.

In order to arrive at a shared and concrete formulation of the identified development questions, it will be necessary to explore them by involving the people affected by the critical issues underlying them or, in the case of new processes, interested in being part of them. This will apply both to the community of directors, with the strategic development questions, and to the community of developers, with operational development questions. The questions will then be re-oriented by involving suitable persons, with whom ideas for new processes will also be investigated. It will be fundamental to help people to refer to concrete situations and not to work on their own representations by activating, in the experiential phase, to interact with colleagues, bosses, suppliers, clients.

During the orientation and involvement phases, it will be important to share the inspiring principles of the new organisational culture and to identify the personal ones underlying the critical points encountered, which live in the consolidated working behaviours and practices. Sharing these

principles and the need to create new, more effective ones with people involved in critical situations is a generative way of change that activates and motivates them in their development. Thus, it will be possible to “direct” the questions so that it is concretised by the various perspectives of the organisation.

Each participant will define in each meeting the concerted step he/she intends to carry out before the next meeting (e.g. contacting a responsible person, a client, talking to colleagues to verify the perception of the problem and the initial definition of the development question, involving a manager in focusing on possible improvements, collecting information, data, case histories, observing symptoms of malfunctioning workflows etc.).

After the orientation and involvement phases, ideas for renewal will be investigated and development processes (process innovation or new innovative processes) will be defined and tested. It will be important to work in the prospecting of future scenarios, with images of the set results which can be modified in the course of the experiments. A dynamic design tools will be proposed for this purpose, as described in chapter 4.

The persons of the two communities of the development infrastructure (future horizontal leaders) will then be helped to define the criteria for the experimentation and its monitoring: essential will be to establish a rhythm which will allow supporting the new path outside the functional commitments in the organisation. Maintaining the space of monitoring (which will include meetings with colleagues and managers) is one of the most important things to enable the change to take place.

The macro-exploratory phase is therefore developed as a micro-cycle which will include moments of orientation of the development question, moments of involvement and investigation, as well as experimentation until a satisfactory outcome is reached and shared with managers and staff.

**The renewal macro-phase** is divided into:

- a phase of defining change and redesigning processes;
- a phase of supporting change and integration.

The new processes tested with the working community are now extended to the various organisational levels.

In the framework of the development infrastructure, the scope of the change (size, persons, responsibilities) will be defined and the processes will be redesigned accordingly, based on the experiences of the experimentation.

The members of the two communities will be supported in defining an appropriate pathway to design the new large-scale processes and define the conditions for change at scale.

In the practical implementation, support for change in terms of role transformation is to be provided through training and support for the individual development of colleagues who did not take part in the trials.

The results of the experiments will be integrated into the existing structure in terms of acquired skills, which have become horizontal leadership competencies and meta-competencies (cf. chapter 5).

In order to support the culture of systemic-evolutionary development, targeted reorganisation meetings and sharing of working methods should be planned, supporting new colleagues in exercising the necessary skills and competencies. Here, too, setting the space of the transformation with the key actors will play a fundamental role.

### 3.2.1. *The transformative learning process*

Transversal to the two macro-phases is the pathway to the generation of new processes, as well as the pathway to the generation of new competencies of the persons involved, in a process of transformative learning. This will be facilitated by the systematic exercise of new skills, stimulated both by the structure of the path and by the exercises that will be proposed (cf. chapter 4). After a first cycle, the skills will become competencies and meta-competencies for the systemic-evolutionary development, allowing the accomplished exercise of horizontal leadership.

As shown in figure 3.9, the transformative learning process will take place on the three levels of reflection, prospection and action, interconnecting organisational and personal levels:

- *reflection and prospection* will take place during classroom meetings: a reflection on organisational and personal criticalities and prospection of change with the definition of the concrete step to be taken;
- *the action* will take place in the concrete work context and will be the realisation of the established step.

The alternating rhythm of reflection, prospection and action will allow the generativity of change.

The step that is taken to transform the process focuses on identifying the criticalities and inspiring (organisational) principles that generated it (see section 2.2.), choosing new ones and planning a concrete step to share them with the working community. The inspiring principles that live in the organisation have to do with its biography and often live unconsciously in established practices. They may be perceived differently by the people encountered in the exploration, so it is important to make them explicit, rethink them and share them to renew the organisational culture in practice.

Reflection on the outcome of the step in the process opens up space for reflection on personal criticalities, which the subjective movement in the organisation highlights. It is, therefore, possible to “see” one’s unconscious inspiring principles, which we call “hidden guides”, by becoming aware of personal mental, emotional and action models linked to one’s biography, which make critical behaviour recurring and then to choose new ones. In order to experiment with a more conscious behaviour, one should then plan a “concrete next step”, which will improve the step one takes in transforming the organisational process.

The rhythmic combination of the two paths triggers a transformative learning process aimed at the systemic-evolutionary development of the organisation.

Overcoming unconscious organisational and personal inspiring principles that lead to recurring criticalities enables the potential for identity development to be released at both levels:

- for the organisation will mean to fulfil its social service more and more effectively by offering products and/or services to specific clients/beneficiaries, who represent its social identity;
- for people, it will be an opportunity to undertake personal and professional development with a view to self-fulfilment.

Fundamental to the process of transformative learning will be the realisation of the next concrete step, both on the level of processes and behaviours. In the action it will be possible to observe the *hidden inspiring principles*<sup>2</sup> and thus transform them, giving new shape and perspective to the process of which one has the leadership. A key point of the exercises used in the pathway is the definition of this concrete step, so that it is really feasible, not a “desirable intention”. The proposed methodology is characterised by

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<sup>2</sup> In the image called hidden principles and chosen principles

# THE PROCESS OF TRASFORMATIVE LEARNING

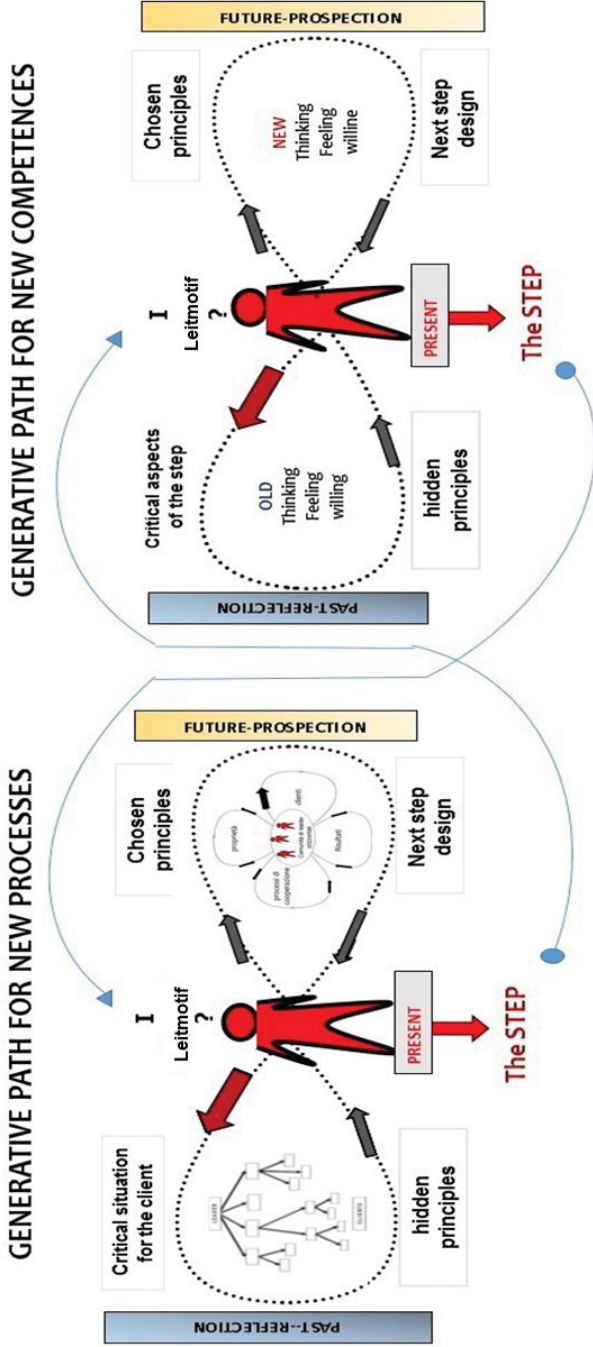


Fig. 3.9 - The transformative learning process for the systemic-evolutionary development of the organisation



being a way of action that allows one to know reality by transforming it, as in the inspiration and practice of action science, which is one of its theoretical foundations (cf. chapter 1).

The transformative learning process will therefore overcome recurring criticalities by supporting people:

- to read the criticalities from the perspective of the organisation's identity process, that of the client and the principles underlying the relations within this process;
- to focus on one's modes of perception in connection with conceptualisation, modes of judgement and inspiring principles, which lead to the usual modes of action;
- to establish development steps in relation to one's professional biography in connection with the evolutionary phase of the organisation, defining and generating proactive scenarios involving the working community.

In this way, functional processes, which have often been designed for internal rationalisation and optimisation, without considering the effects on the client, are gradually transformed into processes which, starting from the client's criticalities, seek to improve the client's relationship with the organisation through the activation and development of the working community.

During the pathway, it will be essential to keep the rhythm of the meetings to support the change. The rhythm will allow to train the new skills proposed in the exercises, to perceive the connections between oneself and the organisational criticalities, highlighting the possible spaces of intervention and systemic transformation.

Both the community of directors and the community of developers will be supported in their new role by focusing on the parallel development of their inner and outer dynamics, which will gradually become visible in a new way of designing and behaving in organisational processes.

Becoming a horizontal leader is a point of arrival. It is to be considered that directors start with strong managerial/functional competencies and that developers start with a basically "executive" and not very pro-active attitude, even if they are people with a potential innovative spirit.

The TRASE pathway moves with assumptions and conditions suitable for change, but new skills, new principles of practice and new ways of seeing and acting must be constantly exercised.

At the beginning of the path, the 4 key competencies of horizontal leadership will be presented:

1. inspiring towards new scenarios;
2. accompanying colleagues who are part of their process to act in their own areas of development;
3. designing and inspiring systemic-evolutionary processes;
4. intervening when the process does not flow in the right way and damages connections with others.

Only by working on the skills proposed in the exercises and the rhythm of the TRASE pathway will these key competencies acquire substance and become *modus operandi* in the organisation, transforming its culture.

At the same time, the directors should exercise the skills at the basis of its own horizontal leadership and support the leadership of developers, giving advice, but not replacing it in the decisions of the design and implementation of their development process, accompanying them instead in their areas of improvement, which are much more evident in change processes than in ordinary work. They should also inspire the connections between the vision of the change and the strategy with which it is intended to be achieved, making the need for the creative activation of all towards a goal of growth that concerns the whole working community and the realisation of its potential.

### Example of interconnection between the question for organisational development and question for personal development

During the horizontal leadership master course, a high fashion entrepreneur from the North-East Italy initially asked the following development question: *“How can I make sure that I am not always the one who has to solve problems with clients if something goes wrong?”*

After a reformulation work, based on the description of concrete facts at the basis, the question became (cf. exercise on the question in chapter 4): *“How can I free my time from operations to devote myself to the*

*development of new markets, new products for existing clients and to the improvement of the offered quality?"*

Reflecting on the concrete issues behind the question, the entrepreneur told about a meeting with all managers to assess what to do with the client following the return of a batch of goods due to late delivery. From the description of the picture of how the meeting was convened and organised, where people were seated, who spoke first etc., it became clear that the inspiring principle of the meeting process was "the boss decides", i.e. the entrepreneur, it was already predetermined that she would eventually have to decide. The new inspiring principle chosen was, therefore "the decision must emerge from the group", and a concrete step was defined as the organisation of a new type of meeting in which everyone would have to bring clear proposals for dealing with the issue by preparing in advance. After testing the step of the meeting with the new inspiring principle, the entrepreneur noticed an improvement in interactivity, but no clear positions on possible solutions.

Reflecting on the criticality of the step taken and telling the group of the master about the dynamics that had taken place emerged as a hidden guide to her personal behaviour: "I alone have to make the decision because the criticality concerns me personally" (cf. exercise on inspiring principles in Chapter 4). The entrepreneur recognised that this principle looked back at her and acted unconsciously in many of her recurring critical behaviours. She, therefore, formulated a new inspiring principle, which she chose for her personal development: "the solution of critical issues is not about me, but about the business community". The next step was to organise a meeting, totally unprecedented for the company, aimed at sharing the development ideas of each member of the management team from the critical issues they could observe in the client's process. This was the beginning of a renewal process, which in a few months, by experimenting with new working methods, led to greater autonomy of the management team, not only in the management of claims but also in the internal organisation.

This gave the entrepreneur more time to devote to client loyalty and new markets. This led to a considerable development of the company in terms of the number of clients and turnover, which subsequently led to an important international partnership.

The example shows how the questions of the process and personnel development are linked, and how they open up renewal scenarios on both dimensions.

## Example of a TRASE path in a company in the automotive sector

After the setting up of the development infrastructure, described in the previous paragraph, the TRASE path began. Here, the horizontal leadership role of the directors towards the developers, who were also considered horizontal leaders, was constantly exercised, overcoming the traditional managerial style of giving directions on “what to do”, which would have blocked the individual initiative.

With both communities the principles and practices of systemic-evolutionary development were shared, with specific exercises to work exploring questions with the working community, experimenting with new processes, and training one’s skills as a horizontal leader.

Particularly relevant was the result of the orientation and involvement phase, in which the developers reported a clear change of perspective on the ideas they had about the critical issues: collecting data and facts, interacting with colleagues starting from the initial question allowed a leap in awareness with respect to the nature of the critical issue itself and therefore the reformulation of development questions. Besides, the interaction with the people affected by the critical issues allowed the collection of ideas for change that surprised the directors for their sharpness and relevance to the processes, which they could never have planned. With a great deal of enthusiasm and participation, possible new processes were developed and their framework for experimentation defined. Obviously, the process was not without its stumbling blocks and repercussions.

After two months, the members of the community of directors were frightened by so much turmoil, fearing that they would no longer be able to control the situation to the detriment of ordinary activities. But the constancy of the process with the established and maintained rhythm, both of the work of the two communities separately and the connection meetings, allowed that in the meetings between the two groups priorities and urgencies for the start of the experiments were established, without creating any criticalities.

Systematic meetings of the two communities led the directors to have clarity on the real achievability of the objectives set in the annual strategy by pushing some development areas according to priority and slowing down others.

The developers have been very happy to create a common path, demonstrating a level of involvement and willingness that has surprised the directors.

At the end of the experimentation processes (16 in two large departments), the path for the implementation was designed, defining a slower time and rhythm of meetings and the conditions for giving continuity to the culture of systemic-evolutionary development, initially accompanied by the consultants. In the design of the process for the future, it was established that the technicians and chief technicians would propose their development questions in a platform, after having explored them, and that in bi-monthly meetings with the directors community it would be decided how to give continuity transforming them in development processes.

The competencies acquired by the directors and developers made it possible to support the systemic-evolutionary development in such a way that, when the company international headquarters decided to start a client service improvement programme, the headquarters where the work with the HOLIO methodology was developed led the way, as they were already prepared in terms of working methods and competencies.

One technician who realised a major project for the company at the end of the path commented during the feedback: "I have never had this happen to me before that I was asked to participate with my ideas to improve the company and when I did, I felt very satisfied and willing to participate".

At the end of the first cycle of the TRASE path, the General Manager shared his thoughts with the community of directors: "The passive attitude of the staff is not part of the DNA of all employees, but is the result of a prehistoric leadership based on the traditional boss-employee relationship. Horizontal leadership and the path taken are highly effective in supporting a cultural change based on the continuous development of management and staff and generating new, advanced competencies. We now have a group of technicians who are able to generate solutions in a teamwork process and then discuss them with the directors, facilitating company development."

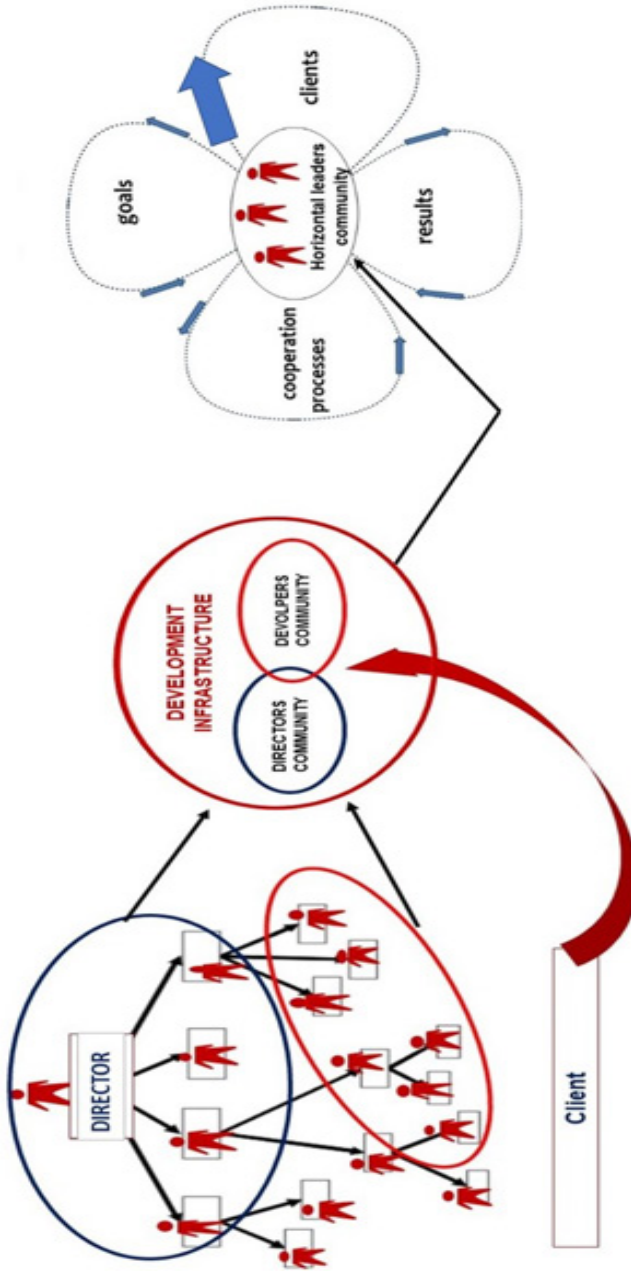


Fig. 3.10 - From differentiation to integration phase through development infrastructure

### 3.2.2. *Towards horizontal leadership and integrated organisation*

*“The rhythm of connections effectively replaces the power of control”.*  
(Erica Rizziato)

At the end of a first cycle of TRASE development, depending on the duration and extent of involvement of the working community, a more or less defined form of integrated organisation and horizontal leadership competencies will have been generated.

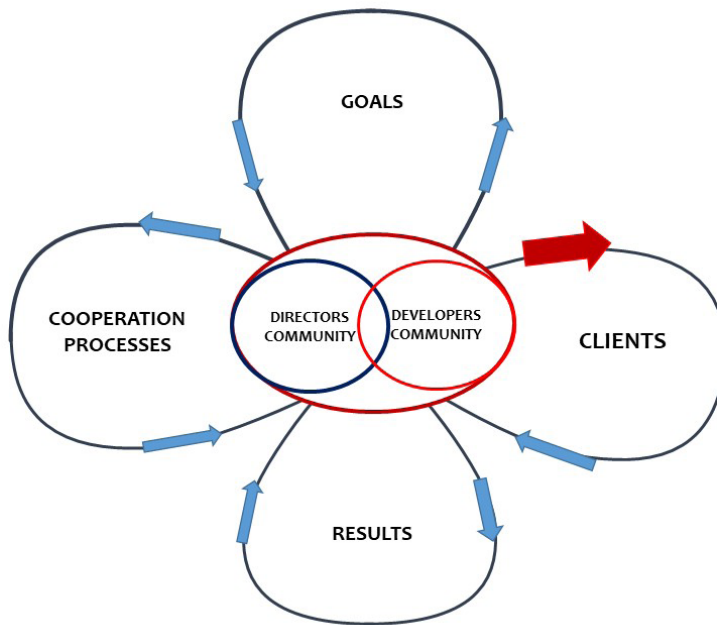
After the first cycle, other cycles can be started, in which the development of the organisation towards its possible future will be gradually realised, thanks to the enhancement of the creative energy of all employees.

The two communities in the development infrastructure represent the leadership at the centre of the four-leaf clover of the integrated organisation, as a “connecting centre” for the realisation of the objectives defined by the company (or institution in the case of the Public Administration) and the related results (the vertical part) with respect to the needs of the clients, the reorganisation of the processes and the development of the people (horizontal part).

It is a non-rigid but “osmotic” form where osmosis is made possible by systematic meetings between the two communities according to the rhythm established for the development infrastructure.

It can be said that in the integrated organisation the rhythm of connections effectively replaces the control and command force of the vertical organisation.

The work of the two communities during the path, as described above, allows the new processes to be “validated” by the organisational community. This avoids the risk of “rejection” of the change, typical of planned change approaches, which most often come up against demotivation to implement the change itself, which is then hardly embodied in new organisational behaviours.



*Fig. 3.11 - The integrated organisation: horizontal and vertical spaces connected by the development infrastructure with horizontal leadership*

In the TRASE path, the vertical technical-economic system is gradually being integrated with the horizontal social system, generating what we call “modern working communities”, places where personal and socio-economic meaning is created. This integration may give rise to various organisational forms depending on the specific situation.

The level of integration of the social system into the techno-economic system can take place in different ways according to the concrete needs and possibilities for change in the specific organisation. If several cycles are set in motion, the organisational form can be completely transformed over time to the point where self-managed and interconnected teams work on the basis of fully client-driven processes. The decision-making level moves ever closer to the client, the structure tends to turn into a network of teams and individuals that are flexible with regard to the needs of their clients. In relation to organisational complexity, some development cycles may be necessary for this to be possible, as horizontal leadership competencies have to be integrated extensively. The two communities may also have various levels of differentiation and articulation. As mentioned, we are not



dealing with a rigid model but with a proposal which takes different forms in different situations, starting from the principles outlined above.

The training of the skills with the exercises and the key competencies of horizontal leadership presented at the beginning of the course, after a first cycle will have a relevant effect in changing the organisational culture. Acting out horizontal leadership in its personal and process formative value will have a multiplier effect in the working community, as it brings about greater personal and organisational well-being.

After a first cycle, a framework of competencies and meta-competencies is acquired, which substantiate horizontal leadership, as described in chapter 5.

In the integrated organisation all support functions, HR, Marketing, Health and Safety, Anti-Corruption, IT etc. will be seen with a systemic perspective, which takes its primary orientation from client needs<sup>3</sup>.

A culture of trust and responsibility is increasingly being created according to the inspiring principles of the systemic-evolutionary vision, which, to be understood, must be experienced in practice and integrated into the ways in which people experience themselves at work, in a perspective of personal and collective growth.

The experiments carried out in the long and complex period of elaboration and testing of the HOLIO methodology have shown that people realise themselves at work by generating the meaning and purpose of organisational life, consciously defining that “adult phase” which in natural systems is inherent in the DNA of each cell. In the organisation, this is only possible with the development of human consciousness, given that, in a systemic vision, individuals are the “cells of the organisation”, according to the reflections set out in Chapter 1.

The competencies and meta-competencies generated thus enable not only the realisation of the integration phase for the organisation but also that of “integration” of the individual as a complex system. They support him/her in overcoming spontaneistic behavioural, through a greater balance of the three ways in which he/she interacts with reality: cognitive, emotional and volitional. This becomes possible thanks to the creative activation of his/her individuality in the context of his/hers own biography and that of the organisation.

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<sup>3</sup> As a matter of fact, this happens all the time, but often in a chaotic and counterproductive way. For example, one food company during the experimentations reported that, although all food safety checks had not been completed, the urgency to deliver expiring products to distributors prevailed over regulations and the delivery was made anyway. Therefore, the connection of processes between the sectors of health and safety and sales was worked on by identifying specific leaders.

It should be pointed out that in the development of the new processes, attention will also be paid to the other organisations of the territory with which the two communities' interface. Relating to the territory from the point of view of a closed system, as it is defined in itself, but at the same time open, as it is connected to the outside, allows the organisation to develop vital qualities for the future. Connections with the territory will obviously be different depending on the type of organisation (see chapter 7).

The integrated organisation represents a practice of Social Responsibility, according to the international standard ISO 26000 and its holistic vision, focusing on the difficult aspect of involving internal and external stakeholders<sup>4</sup>.

On the meaning of the holistic approach, it is worth recalling what should be correctly understood: it is a theoretical position, in the philosophical and scientific sphere, opposed to reductionism, according to which, the properties of a system cannot be explained exclusively through its individual components, since the functional sum of the parts is always greater, or at least different than the same parts if taken individually. A typical example of a holistic structure is the biological organism: a living being, as such, must always be considered as a complex unity-totality, not reducible to a simple assembly of its constituent parts. This is very different from the deterministic approach, which considers that it is the individual parts that form and explain the whole, as may be the case with a machine. The holistic approach considers that it is only from a higher principle that it is possible to understand the development of its secondary aspects in the living organism.



*Fig. 3.12 - The holistic approach of Corporate Social Responsibility for the ISO 26000 standard*

<sup>4</sup> For more details see Rizziato, Nemmo (2012).

Thus, ISO 26000 opens the challenge to consider also organisations as living organisms as the foundation of society. The HOLIO methodology proposes a possible way to concretely realise this vision.

Finally, it must be emphasised that the emergency period that organisations experienced with the Coronavirus led to massive and improvised forms of remote work. The logic and practices of HOLIO paths can support the design of new forms of work that, although mediated by technology, do not lose the contribution of individual and social creativity. Distance working can, in a sense, make people recognise the value of face-to-face interaction, previously taken for granted. The fact that the absence of technological filters creates an indispensable setting for activities oriented to sharing, is more appreciated for the creation of a common sense-making, the development of a sense of belonging to the organisational community, the confrontation on the identity issues of the organisation. If it is possible to manage more operational and routine activities remotely, meeting each other is instead fundamental for a process of organisational development based on the activation of people within a horizontal leadership framework.

Increasingly, organisations will have to deal with the emerging needs of workers in terms of time and place of work flexibility. An emergent phase of distance working adoption is followed by the need to create stable processes based on hybrid working models: i.e. designed to smoothly alternate between face-to-face and remote work. In this context, it will be crucial to define the inspiring principles behind such hybrid models and to work in a participatory perspective on building the necessary connections to make it generative of improvements for clients. Managers will of necessity be called upon to review their role as horizontal leaders to create processes in which all workers acquire greater autonomy in the management of routine activities and, at the same time, can be active in the development of new forms of work. It will become central for people who have responsibilities in the organisation to promote a systemic approach, stimulating, as well as acquiring themselves, new competencies to manage complexity. A strong connection to the organisational vision and equally strong activation of individual responsibility will be required. The old logic of command and control will have to be definitively abandoned.

The integrated organisation will in many cases have to deal with the logic of remote working, but this will not be a difficult transition, thanks to the systemic-evolutionary basis of the HOLIO methodology. In the IMO international community, sustainable forms of remote working are already being designed according to the logic of horizontal leadership and integrated organisation.

In the following, some specific exercises are described, which in the cyclic TRASE pathway enable the training of systemic connection skills, leading to the generation of new processes and competencies/ meta-competencies of horizontal leadership.

## 4. Exercising horizontal leadership by generating the integrated organisation

*“The balance ensured by neural automatisms in the body’s unconscious intentionality is, in the life of the enterprise, conquered by conscious intention, confirmed and modified by the evolution of the internal and external environment, and to be regained through the expression of contradictions and the resolution of the resulting conflicts.”*  
(Francesco Novara)

### Foreword

While the development infrastructure and the cyclic TRASE pathway are the reference framework for systemic-evolutionary connections, the exercises presented are the “heart” of the pathway proposed by the HOLIO Methodology: they have been tested for a long time in various situations and repeatedly revised to better contextualise them in the HOLIO pathway<sup>1</sup>. They are characterised by the double connection between personal and organisational development. In doing so, one has to exercise specific skills which are outside the usual way of relating and require a strong individual activation, focusing the intention on systemic-evolutionary dynamics. They all end with the definition of a “concrete next step” which will allow to test what has been decided and to verify it. This will not be the definition of generic intentionality but will have very practical characteristics, defining what, when, how, where, with whom...

The rhythm of the TRASE path will then allow to reflect on the outcomes and re-design the steps, if necessary.

The training in exercising new skills, stimulated in each exercise, to get out of behavioural spontaneism, at the end of the TRASE course will lead to the acquisition of a framework of competencies and meta-competencies that substantiate the key competencies of horizontal leadership (described in chapter 5).

The skills that will be practised will allow us to read and act on existing connections:

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<sup>1</sup> Some of these were developed by the author in the action research process, others in the NPI and by Bekman (2007, 2014), and still others were developed in the context of research activities of the international community IMO.

- “between” the different organisational factors;
- “between” one’s personal systemic dimension<sup>2</sup> and organisational reality;
- “between” one’s own personal systemic dimension and others’, in relation to the organisational context.

The exercises are aimed at:

- the broadening of perception to look at organisational and personal criticalities in relation to the connections that determine them;
- focusing on one’s work reality in factual terms by highlighting the difference between actual facts and their interpretations;
- stimulating the awareness of the inspiring principles behind and the effects of their actions;
- the development of systemic thinking, capturing possible evolutions;
- action orientation in an exploratory and experimental way through the definition of concrete next steps;
- stimulating responsible, aware and creative social behaviour;
- the perception of themselves as evolving and co-evolving with the organisation, as horizontal leaders.

In relation to the development of systemic thinking, it is important to point out that in the proposed methodology it is not only considered as the ability to connect the parts related to a certain event (as normally conceived) but also as a meta-competence to overcome behavioural spontaneism through the connection of the different constituent parts of the person<sup>3</sup>. The theoretical basis of the HOLIO methodology, as presented in chapter 2, considers complexity not only in the external world but also in the inner world and especially in their interconnection.

The effort to connect the internal and external worlds is an important element for the generation of horizontal leadership competencies. As pointed out above, we certainly cannot think that perceptions are in themselves objective, as are all the concepts that belong to us: they are the result of experiences and therefore to be brought to awareness, they are our “reality reading glasses”, they do not represent reality itself.

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<sup>2</sup> See the systemic-evolutionary image of the person in section 2.1.

<sup>3</sup> See the description of the meta-competence of systemic-evolutionary thinking in chapter 5.

In the TRASE pathway, which alternates between reflection, prospection and action and the following exercises, it will be possible to trace the biography of one's thoughts, emotions and actions, as well as to focus on one's leitmotif, generating a progressive awareness. This is particularly important in developmental paths, as the reverberation of the inner world of the individuals in their outward reality is not self-evident, but very much conditioning organisational contexts.

We can see this in the frequent disconnection between our intentions and the effects of our actions: for example, sometimes we want to do our best, but the effects can be disastrous for someone. We can also observe that we do not always fully understand what we are creating and are called upon to continuously explore the reality of things by interacting with others to become aware of it. We can only make sense of our actions retrospectively, and this sense can be completely different from the intention that moved us in the first place. The attribution of meaning is something we can do as an individuality, in a tension of freedom and therefore of responsibility, which brings us into a moral category of the organisational sphere, with a value that cannot be only egoic, but belongs to a collective construct, as well as to the search for our biographical leitmotif.

The exercises proposed in the TRASE path are of two kinds:

- exercises focused on the development of the process, which allow to experiment skills useful for its realization;
- exercises focused on one's skills and behavioural changes that allow one to define useful steps for the development of the process.

In the former, participants start from the description of the criticality of the organisational situation, in the latter, they start from personal and relational criticalities. Some may have a double value.

The sequence in which the exercises are presented is not to be understood in order of importance. Their combination and the way in which they are presented in the cyclic TRASE path belong to what we can call the **art of consulting**, not a technique, which only a consultant who has already acquired the competencies and meta-competencies of horizontal leadership can meaningfully propose to his/her clients.

The exercised skills, besides generating first and second level competencies (as described in chapter 5), substantiate the key competencies of the horizontal leader which are proposed as a "track" at the beginning of

the pathway: to inspire towards future scenarios, to accompany people in their development, to design and guide systemic-evolutionary processes, to intervene on the blocks to change.

The exercises are of 3 types:

1. **dialogue exercises:** to be carried out in groups, in which one experiments with how to transform organisational criticalities into possible new development processes; they are focused on three elements: the process in which people are, personal and organisational biography in which changes make sense, the ways of observing and narrating facts between listening and dialogue;
2. **observation/perception exercises:** to be carried out individually observing, with the use of “12 senses”, organisational situations from certain points of view which normally escape or are taken for granted, but which are very important in the logic of development;
3. **movement exercises:** to be carried out in groups for the perception and experimentation of the complexity of the work connections with movement (Movcore exercises: movements for consciousness in organisations inspired by eurhythm)<sup>4</sup>; they allow to open new perspectives of reading the relationship between the organisational reality and one’s personal system of connection with the cognitive, emotional and volitional dimension and above all the intentionality, the level of the I; they can also be carried out individually following sessions of Professional Biographical Coaching (PBC) in which the need emerges to make some individual steps regarding the perception of oneself and one’s dynamics that block development. Their formalisation derives from research and experimentation activities carried out during the project mentioned in chapter 1.

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<sup>4</sup> The writer, a professional eurhythmist, has defined the following exercises under the name Movcore, as they are specific for the connection to the organisational world. Eurhythm is a broad discipline, ranging from art, therapy, pedagogy and social work. Some Movcore exercises were inspired by the valuable work of the Dutch eurhythmist Annamarie Ehrlich, with whom she worked for many years, who pioneered eurhythm in the social sphere. Ehrlich started offering eurhythm in work contexts in the 1980s at the request of some NPI consultants who were asking for new ways of working on managers’ skills. Many Dutch and German organisations experimented with the eurhythm proposed by Ehrlich, who then disseminated it in various parts of the world.



#### 4.1. Dialogue exercises: becoming aware of how the inner world co-generates the organisational world

*“What is more brilliant than gold?  
Light.  
What is more comforting than light?  
Dialogue”.*  
(Johann Wolfgang von Goethe)

The exercises described below are offered to groups of 3 or 4 persons and are aimed at training specific skills that underlie horizontal leadership.

Each person plays a role which we call A, B, C, (D). However, these exercises are very different from traditional role-playing games in that each person is fully himself or herself in each role during the exercise.

In particular, participants are strongly urged to activate the dimension of intention by recalling the presence of their I in order to try to perceive interactions at a level that normally escapes the usual spontaneous dynamics.

These exercises aim to develop a presence in the here and now by increasing the perception of self and context.

Everyone is called upon to make an inner “act of will”, to relate to a higher level of awareness, observing the basis of the usual dynamics to converge towards increasingly conscious behaviour.

Individual activation, the level of intention, is stimulated in particular to focus on the next concrete step and define it clearly.

The exercises are presented according to the following scheme:

- *meaning and motivation*: why the exercise is useful in the path proposed by the methodology;
- *unfolding*: outline of the exercise to be shared with participants;
- *skills to be practised*: to be shared with the participants before the exercise and in the follow-up after the experience;
- *after the exercise*: how to connect the step defined in the exercise to the working context.

At the end of the exercise it is important to follow up the skills practised in the personal experience by focusing on two points:

- quality of the experience;
- learning.

This is fundamental because the exercises take people into an experience from which, to extract learning, it is important to reflect individually and exchange in the group the personal acquisitions, which are always an enrichment for others. The value of learning is thus enhanced, as listening to others makes it possible to focus on many aspects that personal experience, for obvious reasons of perceptual filtering, does not allow to be grasped.

The proposed exercises have a structure that facilitates the ability to support each other across the board, providing for the rotation of roles. The constant attention to the construct of time is functional to concentration and trains an essential faculty in development: the sense of time and rhythm.

The fact that each exercise ends with “the next step” makes the experiential perspective that characterises the TRASE cycle path concrete.

The person proposing and facilitating the exercises must already have acquired the skills in question and, especially in the first round of roles, will try to stimulate the participants to stay in the role, which is not always easy.

The following exercises are prototypes, which the art of consulting adapts to specific situations. They represent basic types (but there are many others) which have been developed in numerous variations, diversifications and further developments as part of the ongoing action research work of the IMO International community.

## 1. ACTIVE LISTENING EXERCISE ON 4 LEVELS

*“Talking is a need. Listening is an art”*  
(Johann Wolfgang von Goethe)

### *Sense and motivation*

When we listen, most of the time we quickly detach our attention from the speaker and start to do some “interpretation” work. We approach the topic personally, or we make an effort to interpret and/or seek answers to what is being said if it is a critical issue. In any case, we are not listening to the other person, but mainly to ourselves.

### Typical traps:

- tending to confirm what I already knew (listening for confirmation - “yes, I already know”);
- tend to listen to oneself (while listening I project myself into the other - “I know how you feel”);
- listening distractedly (I listen paying attention only to content and words - “I don’t look at you but I listen to you”);
- listening in an antagonistic way (while listening I already process the objection - “yes, but...”);
- listening with the intention of finding a solution immediately, often on the basis of one’s own experience and knowledge which does not necessarily work in the specific case, since one starts from illusorily similar situations (while listening I think I have already found the solution - “to solve the problem you should do this...”).

Connecting with the other does not happen spontaneously but requires a conscious effort. It presupposes the temporary suspension of one’s parameters of judgement, ideas, and usual ways of thinking. It means leaving one’s cognitive territory, aversions or projections and creating an “empty” space where the other can express him/herself.

If we want to develop, listening should aim to focus on the essence of the story and, consequently, on what inner and/or outer action we can recommend to the subject we are talking to in order to “move” the situation in which he/she finds him/herself. It is not only about listening to words but in a broader sense, with respect to the three levels with which we relate to reality:

- the cognitive level: the thoughts and concepts made explicit;
- the emotional level: the emotions and feelings expressed;
- the volitional level: the will impulse, i.e. what the person has actually acted in the situation and the interest in carrying out actions with respect to what is being discussed.

It is also essential to activate listening on a fourth level, that of the I, which can help to glimpse the direction in which that individuality tends to move. This very profound level of listening requires a strong focus on the facts

being listened to and at the same time a perspective detachment, to grasp at a “meta” level what the other is expressing as an individual, the essence, trying to perceive the direction of the intention and, as far as possible, its leitmotif.

### *Unfolding*

In a group of 3 persons A, B, C, for 20 minutes per session (Phase 1 and Phase 2), then the roles are reversed so that everyone experiences the three positions of the exercise.

Total time: 60 minutes.

#### *Phase 1 (10 minutes)*

A: tells for 10 minutes a critical fact of his work, trying to make the criticality visible to B with concrete examples and pictures.

B: listens actively inwardly, creating an “empty space”, does not ask questions or make comments, but focuses on 4 aspects:

- content: what A is actually saying;
- feelings: what emotions come to me from A and how it is related to what he is saying;
- willing: where A’s intention moved;
- I: where A’s individuality, his deep intention, would have wanted to move.

He waits calmly during breaks by creating an “empty space” even when there is silence; this helps A to focus on himself and the context and himself in the context;

C: keeps time, observes the interaction process (posture, gaze, concentration...) and tries to capture the essence of the story.

#### *Phase 2 (10 minutes)*

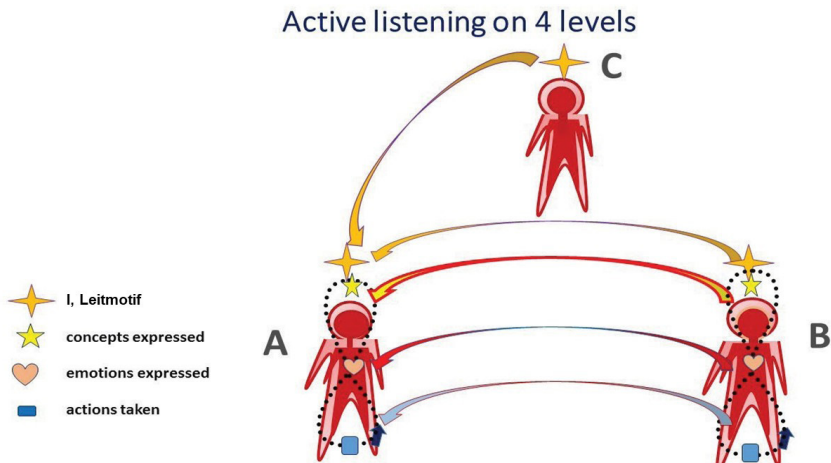
B: After 10 minutes, he/she summarises to A what he/she heard, not in terms of content, but as a “mirror” of the 4 levels, without proposing solutions; he/she then expresses his/her personal position on what he/she heard, with the intention of helping A “to move” the critical situation;

C: gives feedback on the flow of the interaction and expresses what he/she “saw” about the essence of the story;

B and C: give suggestions to A regarding the critical situation for a

possible step to be taken;

A: formulate a concrete step.



### *Skills to be exercised*

A:

- telling a fact in terms of images, with concrete examples, so that the interlocutor can “see” the situation, avoiding speaking abstractly;
- to avoid telling about one’s interpretations or evaluations, but to stick to the facts, or to talk about one’s feelings, but without confusing the levels.

B:

- silencing personal thoughts and feelings and trying to grasp as much as possible what A is expressing; he must make the effort to “be” with A and not with himself;
- focusing on several dimensions at the same time: on the thought (what A says at the level of content), on the emotions/feelings accompanying the content, on the concreteness of the facts told which can show the direction of his will;
- grasping a meta-level above the 3 levels, i.e. how much the individuality in front of him is connected or not to the actions narrated.

C:

- trying to capture the essence for A of what was heard;
- focusing on the listening dimension by observing when it flows well and what conditions favour it (gaze, posture...);
- do not wasting the time of the process.

### *After the exercise*

The experience of the exercise is of little use if one does not start active listening training during one's working and personal life. In development processes, it is essential to listen in a way that is different from the ordinary, as this is the only way to activate new and different connections. The skills practised in the exercise are only a "beacon" that illuminates the view of our inner life in relation to listening. But habit and inertia will soon erase this experience if one does not put in place a daily self-development intention to become a horizontal leader, i.e. to link one's way of thinking and perceiving to the actions one carries out, checking how much they are linked to the intentions behind them. It is a matter of bringing the will into one's inner world, which also develops, renewing the organisational way of acting. It is not a matter of learning a technique, but of activating a self-guided process of renewal and awareness. How we listen is the first step.

## 2. EXERCISE TO DEFINE THE DEVELOPMENT QUESTION

*"When you think you have all the answers, life  
changes all the questions."  
(Charlie Brown)*

*"Before assessing whether an answer is right, one has  
to evaluate if the question is correct."  
(Immanuel Kant)*

### *Sense and motivation*

When experiencing critical issues in organisational contexts, it can be observed that the representation of the underlying problem is often different between people, as everyone reads reality according to their own mental models, their own ability to perceive the context and their own experience and position with regard to the critical issue in question. It is not effective to argue in order to convince others of one's reasons, as everyone has a different view of reality, due to their own experience and biography.

Problem-solving skills are usually emphasised in the organisational context. It is certainly indispensable for dealing with small and large problems that arise within the work routine, but it is not so useful when recurring critical issues arise that cannot be resolved in the ordinary context, which is probably the cause. It is, therefore, necessary to take a broader view and move from problem-solving to problem-setting, to scenario awareness, bringing into play new skills. It is illusory to think of finding ready-made “solutions” when it comes to renewing organisational processes involving several people and functions: what is needed instead is the ability to work with questions.

Therefore, it is necessary to pass from the vision of a critical reality as a problem to one as a need for development, reconnecting to the ultimate sense of the organisation: to propose a product/service useful to a certain type of client/beneficiary. Formulating these criticalities in the form of development questions is the first step to share and co-create, at various organisational and functional levels affected by the criticality, the future process of change.

An immediate solution only needs to be implemented, whereas a development question requires to be shared, re-oriented in a process in which others can also express themselves and, if necessary, activate. Development questions can be defined as “slow” compared to problem-solving questions which are more immediate.

Formulating critical issues in the form of a question for development is not a mere grammatical exercise. Our language, the way we describe our surroundings, is closely linked to our perception of them. Development questions are future-oriented questions (how can we/I...?), they are concrete, i.e. they are based on real data shared by all, they are expressed in a language that is not ambiguous, they are open, i.e. they are oriented towards different possible scenarios without containing, explicitly or implicitly, a solution, and they are linked to the understanding of the evolutionary character of the organisation. Moving from the observation of criticality to the formulation of a development question opens up a process of progressive sharing and awareness of the real need for change.

The first step to work with the development questions is the following exercise, which will end with the definition of a “next step”, which will open a scenario of exploration and orientation of the question with those affected by the criticality. After the exercise, once the nature of the question has been established, it will be checked and if necessary reformulated several times in an exploratory process until it becomes concrete and leads to improvement actions accepted by the organisational system.

## *Unfolding*

In a group of three people A, B, C, for 20 minutes per session, then the roles are reversed so that everyone experiences the three positions of the exercise.

Total time: 60 minutes.

### *Phase 1 (3 min)*

A, B, C reflect silently and individually on the concrete criticalities of their context, formulate a question for the development and write it down.

### *Phase 2 (4 min)*

A: reads the question to B.

B: in dialogue with A, he/she should help him/her to better enter into the nature of the question; he/she does not ask for information to understand, but for concrete examples and descriptions of images and facts (who, when, what, where). He/She should try to concretise the question by helping A to get out of his/her abstractions and representations. For this, it must bring him/her back to the concrete situation, as if it were an image that both can “see”. It will then be possible for A to reconsider the formulation of his/her question.

C: keeps time and observes the quality of the dialogue, trying to grasp the “meta-level”, the essence; focuses in particular on how B interacts with A, observing whether or not he/she is helping him to realise his/her question.

### *Phase 3 (4 min)*

C: asks A to rephrase the question in writing.

B: can help A to reformulate it, but it is A who must try to focus the initial question differently.

C: gives feedback to B on how best to help A.

### *Phase 4 (4 min)*

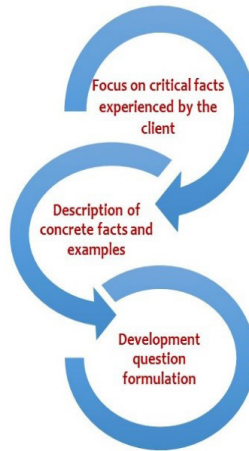
On the basis of the new formulation, B resumes the dialogue with A who, after 4 minutes, with C rephrases the question for the third time and writes it down.



*Phase 5 (5 min)*

A, starting from the last formulation, with the help of B and C, defines a concrete next step which may open a scenario of possible question exploration.

## From the problem to the development question



1

### *Skills to be exercised*

A:

- describing a recurring criticality from the point of view of its impact on the client/beneficiary by giving concrete examples and sharing pictures of the facts;
- not looking for solutions, but exploring the concreteness of the question;
- defining a concrete next step to be taken in a defined time frame (who, when, what, how, where...).

B:

- active listening, focusing on the concreteness of the question;
- not judging, interpreting, nor giving solutions, but interacting with A with the aim of helping him/her clarify and concretise his/her question for development.

C:

- observing the quality of the dialogue between A and B: rhythm, time, added value with respect to the evolutionary transformation of the question;
- trying to grasp the “essence of the question”, the meta-level above the dialogue, what appears beyond the words;
- helping B with feedback to support A in defining its development question;
- dialoguing with A to help him/her define the concrete next step to be taken at a fixed time in the near future (who, when, what, how, where...).

### *After the exercise*

After defining the next step, the exploratory path of the development question with the working community starts, which in the cyclic path TRASE implies the interaction with the subjects affected by the criticality, who will have to take an active part in the change. A development question explorative plan must be defined. It has to take into account some aspects:

- during the orientation and involvement phase of the cyclic approach, it will be necessary to “mature” the question; for this purpose, three elements should be considered:
  1. who is interested in the change (top management, colleagues...);
  2. the centrality of the beneficiary of development (client/user);
  3. the motivation and commitment of the people involved;
- in order to involve key actors in the question orientation, it is necessary to set up a dialogue of development and not of knowledge or problem-solving. In this dialogue one tries to capture the individual element of the interlocutor and its relation to the critical situation and the question;
- observe the recurring criticalities underlying the question by collecting data and facts and how they are experienced by those affected;
- clarify the profile of clients and observe how critical issues reverberate on what is called the “client process”, i.e. the various experiences the client has with the organisation (e.g. sales, administration, delivery...);

- involve and activate the people affected by the criticality and focus on those who are most likely to develop changes, to redefine the question until it is shared, collecting ideas for improvement.

### 3. EXERCISE TO UNCOVER THE "HIDDEN GUIDES" OF THE PROCESS

*"Organisational culture is the coherent set of fundamental assumptions that a certain group has invented, discovered or developed while learning how to deal with problems related to its external adaptation and internal integration."*  
(Edgar Schein)

#### *Sense and motivation*

Organisational behaviour is linked to the culture that lives in the context, which is "embodied" in the processes themselves. Culture is composed of inspiring principles which characterise that specific organisation or type of organisation. For example, in an authoritarian culture, the inspiring principle can be said to be "only the boss decides"; in a bureaucratic culture, the inspiring principle is "I did not decide, the rules decide". Functional organisations are typically animated by the principle "it is important to rationalize activities", the integrated organisation has among its inspiring principles "it is fundamental to create added value for the client, the people, the capital, the territory"<sup>5</sup>. The organisational culture is composed of various inspiring principles, some primary, others secondary, which contribute to define the identity of an organisation through the form of processes and working behaviours following those principles.

People are not always aware of the organisational inspiring principles on the basis of which they act, and sometimes they think they can initiate change without making the old principles explicit, which lives as automatic and unconscious "hidden guides".

This is, however, an essential step in generating new ways of working. It also happens that new inspiring principles for a change of culture are enunciated, but then no concrete work is done to implement them in practice, or changes are made in a "technical" way without considering the living part of the processes, i.e. working behaviour, with negative results. This is a key aspect in which it can be observed that people are the synthesis

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<sup>5</sup> The HOLIO methodology proposes a framework of inspiring principles for a systemic and evolutionary development, as described in section 3.1.1

element of complexity: it will be the developers, leaders of change, who will highlight how principles to be changed live in processes and behaviours, activating themselves and their colleagues in generating a new culture lived in practice.

The exercise is important to observe the detected criticalities, looking at them from the point of view of the client and the principles that gave shape to the process in question, as can be schematically seen in the generative path of new processes. It represents the organisational part of the transformative learning process (Fig. 3.9, Chapter 3.2.1.).

### *Unfolding*

In a group of 4 people A, B, C, D for a duration of max. 40 minutes per session, everyone plays the role A and the role of the interlocutors.

Total time: 2.40 hours.

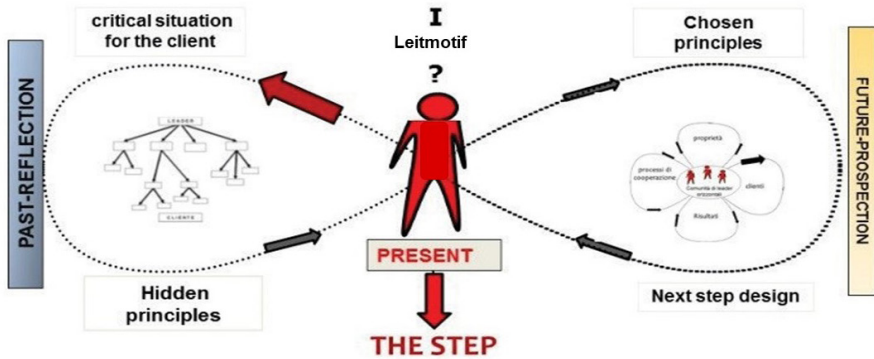
#### *Phase 1 (10 min)*

Person (A) describes as an image a concrete episode that represents a critical point in the process that he/she wants to change, highlighting the impact on the client; describes with particular care the behaviour of people in the process activities. B and D can ask questions to clarify the picture (where, who, what, when). C keeps time and observes what A has said, trying to grasp the hidden inspiring principles that unites the behaviour of the people active in the process.

#### *Phase 2 (5 min)*

B, C and D characterise what they have heard, avoiding explanations, judgements, interpretations, but reporting what they have subjectively experienced during the listening, what has come to them as an element characterising the process, according to what they have heard (e.g. "I felt coldness in the activities of the process by most of the people involved", or "I perceived listening and interest by people"...). We do not necessarily have to agree with what others perceive of what we tell them, but take note of it, as an aspect of the reality of which we may not be aware.

## GENERATIVE PATH FOR NEW PROCESSES



### *Phase 3 (10 min)*

The group and A search for the prevailing inspiring principle that may underlie the critical process described and express it in a few words; A reflects and chooses the hidden inspiring principle that he feels responds best to the process he wants to improve.

### *Phase 4 (10 min)*

A with the group explores how to re-orient its inspiring principle. Everyone makes a proposal and A decides which new chosen inspiring principle to choose for the future process.

### *Phase 5 (5 min)*

A with the group defines a concrete next step to test the new inspiring principle in practice and share it with the people affected by the process.

### *Skills to be exercised*

A:

- describing in pictures trying to make colleagues part of a real fact by overcoming their own representations;
- accepting the characterisations proposed by colleagues as a subjective truth about which there is no point in discussing; it can be useful as a restored “slice” of the reality generated by the story;

- searching for the “hidden guide” of the process;
- defining a new and conscious “inspiring principle”;
- designing a concrete next step in which to test the new principle.

B, C, D:

- characterising to help A improve his working process: they do not judge, but give back the personal experience of the fact listened to in order to help the interlocutor observe what ideas live in that critical process. They do not express judgements, but only the personal experience of a story, what “came” to me; it is a subjective truth, not an objective one. Being aware of this helps to avoid clarifications and discussions. The characterisation should be seen not as a judgement, but as a perspective on the situation, without tending to exhaust its nature.
- active listening on 4 levels.
- listening at a meta-level, beyond the factual account, also to the hidden inspiring principles, which live in the behaviour of the people involved in the process, we can say the essence of the story, the primary cause of the criticality highlighted by A. It is, therefore, necessary to exercise very careful listening and, if anything, to investigate the facts without losing the focus on how people live the process, which are the common principles of their behaviour. The risk, as in the exercise of active listening, is to decentralise attention from A to one’s personal experience. A great deal of awareness of where the intention lies is therefore required.
- helping A to define new and more suitable inspiring principles.
- dialoguing with A to define a concrete next step in which the new principle can be implemented.

### *After the exercise*

The step drawn after the exercise will be useful in exploring the question of development and the critical issues experienced by the various actors in the process in question. They should be made aware of the fact that they are embodying an organisational principle and culture, and invited to collaborate in changing the process according to a new principle, which should be shared with them.

Whoever is in charge of the leadership of the change will have to reiterate the necessity to adhere to deeds and behaviour to the new chosen principle.

During the cyclical TRASE path, the old inspiring principles will gradually leave room for the new ones, which will be experienced in new behaviours. Thus begins the transformative learning path for the systemic evolutionary development of the organisation.

#### 4. EXERCISE TO IDENTIFY INDIVIDUAL "HIDDEN GUIDES"<sup>6</sup>

*"We do not see the way things are,  
but we see them as we are".*

(Anais Nin)

##### *Sense and motivation*

Our behaviour is guided by principles and ideas of which we may be more or less aware. They can derive from values or cultural aspects, which have settled in us, as well as from repeated practices, acquired over time (school, family, emotional relationships, previous work experiences, etc.). Most of the time we have internalised them because they are useful in given circumstances or derive from experiences that are significant for us. Not all principles that guide behaviour belong to our conscious thinking. For example, a manager may be convinced that he has a good dialogue with his employees and is always available, while their perception from internal questionnaires shows that he does not listen. What we think is not always what we embody in our behaviour.

However, by reflecting on some recurrent critical facts about ourselves, we can "extract" from reality some principles that we are unaware of and that guide our actions without our being aware of it (e.g. "you are not a good leader", "you have to make decisions yourself"...). We speak in this case of "personal hidden guides". These are the beliefs and automatisms that drive our actions and result in recurring criticalities, despite the rational attempts we can make to change. When we want to make a change, often these unconscious guides are an obstacle to our intentions of personal and organisational renewal: they make us repetitive in our behaviour and, beyond good intentions, we are not able to really generate something new. It is therefore important to identify them, so that they can be replaced by more knowledgeable and chosen ones, in relation to the improvements to be achieved.

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<sup>6</sup> For more on the concept of hidden guides and individual inspiring principle, see section 2.1.

When there are criticalities, learning to observe behaviours according to the principles that inspire them, and redefining them in a chosen way, helps to relate consciously and thus to generate sustainable changes over time.

The exercise is crucial to facilitate behavioural development in relation to concrete steps that are taken in the development process, as can be schematically seen in the generative pathway of new competencies. It represents the individual part of the transformative learning pathway (fig. 3.9, par. 3.2.1.).

### Unfolding

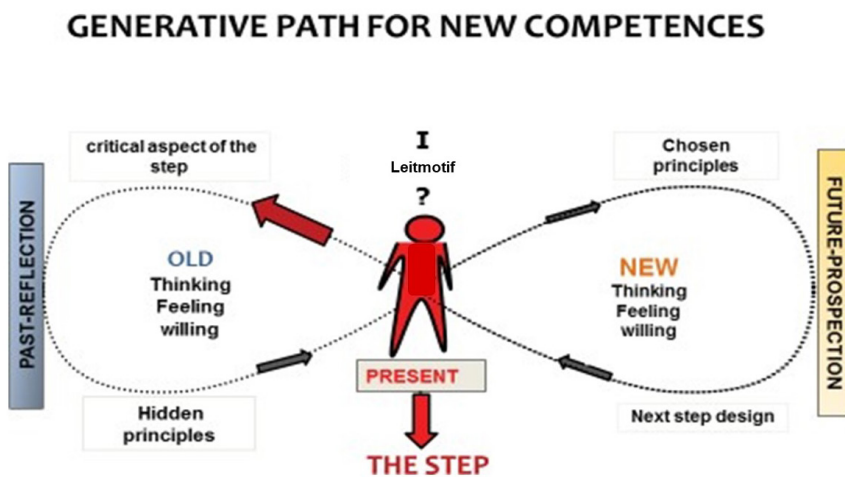
In a group of 4 people A, B, C, D for a duration of max. 40 minutes per session, everyone plays the role A and the role of the interlocutors.

Total time: 2.40 hours.

#### Phase 1 (10 min)

One person (A) describes as an image a concrete episode that represents a personal criticality. The group can ask questions to clarify the image (where, who, what, when). In this way, he/she also describes the “internal facts”, i.e. what he/she felt in the situation.

B listens to the content part, C to the emotional part, D to the will impulse; all three try to grasp A's intentionality and can ask questions to clarify the proposed image, which has to emerge as if it were a piece of film.





*Phase 2 (5 min)*

The group reflects and characterises avoiding explanations, judgements, interpretations, but reporting what they subjectively experienced during the listening, what came to them as a peculiar element (e.g. “I felt anger”, “I perceived you to be disinterested”...). The person highlights whether one of the characterisations particularly strikes him/her, without arguing if he/she does not like it: it is a personal perception, which has part of reality in it but does not fully represent it. We do not necessarily have to agree with what others perceive of us, but take note of it.

*Phase 3 (10 min)*

The group and A search for the inspiring principle that may have stimulated the critical situation and express it in a few words; A reflects and chooses the hidden inspiring principle that he feels like responding to him.

*Phase 4 (10 min)*

A with the group explores how to re-orient his/her inspiring principle. Everyone makes a proposal and A decides which new inspiring principle he/she wants to choose for the future.

*Phase 5 (5 min)*

A with the group defines a concrete next step to test the new inspiring principle in practice.

*Skills to be exercised*

A:

- describing in pictures trying to make colleagues part of a real fact by overcoming their own representations;
- accepting the characterisations proposed by colleagues as a subjective truth about which there is no point in discussing; it can be useful as a returned “slice” of the reality generated by the story;
- searching for one’s “hidden guide”;
- defining a new and conscious “inspiring principle”;
- designing a concrete next step in which to test the new principle.

B, C, D:

- characterising to help A in a process of individual development: they do not judge but give back the personal experience of the fact listened so to help the interlocutor “observe himself with others’ eyes”. Therefore, no judgements are expressed, but only the personal experience of a story, what has “arrived”, it is a subjective truth, not an objective one. Being aware of this helps to avoid clarifications and discussions. For instance, a characterisation might be: “I got anxiety in your story”. This does not mean that “you are anxious” but that I perceived anxiety. This may be useful for A, who perhaps thought he was telling a fact to which he was indifferent. Vice versa, it may be that an inner dimension of B has amplified an emotional aspect of A. As said before, in social interactions there is no “objective” truth, we can only observe it in empirically observable concrete facts. The “inner facts” that give life to social dynamics must be explored from the external facts, which show us and reflect parts of our inner selves. The characterisation should therefore be seen not as a judgement, but as a gift, which may or may not be useful to A, who is free to accept or reject it.
- active listening on 4 levels.
- listening beyond the factual account to the hidden inspiring principles, we can say the essence of the story, the primordial cause that is not to be found in one’s personal judgement, but in the facts that A recounts. It is, therefore, necessary to listen very carefully and, if anything, to investigate the facts without losing focus on A. The risk, as in the exercise of active listening, is to decentralise attention from A to one’s personal experience. A great deal of awareness of where one’s intention lies is therefore required.
- helping A to define a new and more suitable inspiring principle.
- dialoguing with A to define a concrete next step in which the new principle can be tested.

### *After the exercise*

The step designed after the exercise implies experimenting with one’s recurring criticalities in a different way than one would normally do. It is illusory to think that change occurs after the step is taken. Instead, it is important to embark on a path of personal transformation that has a rhythm, as shown in the image above. Once the step has been taken, in the TRASE

path one reflects with colleagues on the results, evaluating whether the new principle has really been seen in practice. During the cyclic path, groups initiating change processes systematically do this exercise in rhythmic personal development meetings with Professional Biographical Coaching. Within a short period of time they learn how to help each other, they learn to learn interactively.

Thus begins a cyclic path of personal development in transforming organisational criticalities, as visualised in the transformative learning process for the systemic-evolutionary development of the organisation (fig. 3.9).

## 5. CLIENT PROCESS ANALYSIS EXERCISE<sup>7</sup>

*“You will never have good relations with your clients  
until you have good relations  
with your employees.”  
(Walt Disney)*

### *Sense and motivation*

Complicated work process analyses are often carried out without considering what the client/beneficiary experiences in relation to the organisation. This leads to great difficulty in making effective change interventions and focusing on the true nature of the criticality. In order to have an orientation picture of the issue, it is useful to draw it by thinking of it in the flow of the client’s process, focusing on 3 levels: that of the phases in which the client comes into contact with the organisation, that of those who collaborate in each phase, and that of those who decide in each phase. For the first level, these are macro-phases, we do not go into detail, but try to have a general picture of the process concerning the client’s experience, across organisational functions.

Having an overview of the phases, collaborations and responsibilities in front of you helps to focus on the critical points and thus which step to take to start changing the situation by involving the people related to the problem to be tackled.

The exercise can help to focus the question for development particularly in complex situations. It can also be functional to develop change initiatives by activating working groups or the leadership of a developer in renewal

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<sup>7</sup> For clarification of the definition of “client process” see Foreword chapter 3.

processes. In general, it allows creating a first “systemic framework” around a critical issue.

The fundamental point is to focus on the people involved in the critical moments of the client interface with the organisation and to be able to explore with them the changes to be experimented with to make the client process better. Often conflicts between people occur because they interact in poorly designed processes, so enabling them to reflect on what is wrong and what needs to be changed also helps to improve the climate of relationships.

### Unfolding

In a group of 3 persons A, B, C for 35 minutes per session; each person plays the role A and the role of the interlocutors.

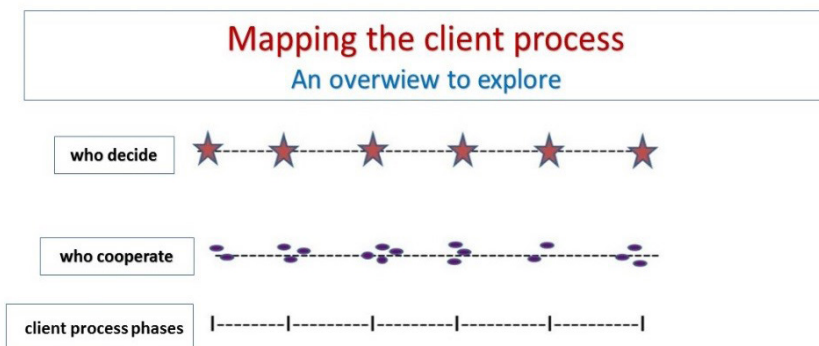
Total time: 1.45 hours.

#### Phase 1 (10 min)

A: proposes a criticality by thinking about the process in which it manifests itself.

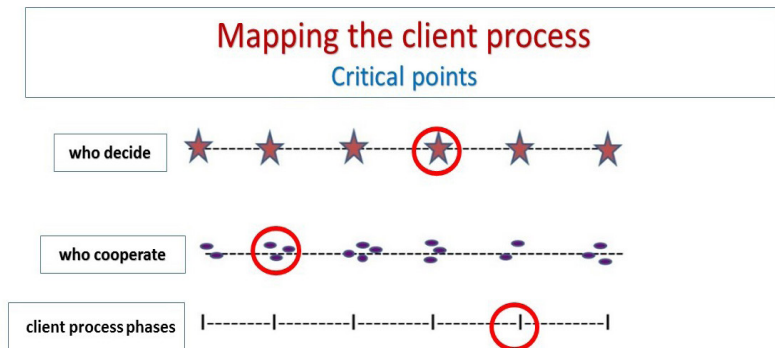
B: helps to design the process by exploring with A its extension from the client’s point of view; the macro-phases are then reported, also transversally to the business function in which the criticality is manifested; it is then focused who collaborates in the phases and who takes the decisions.

C: keeps time and helps the interaction between A and B.



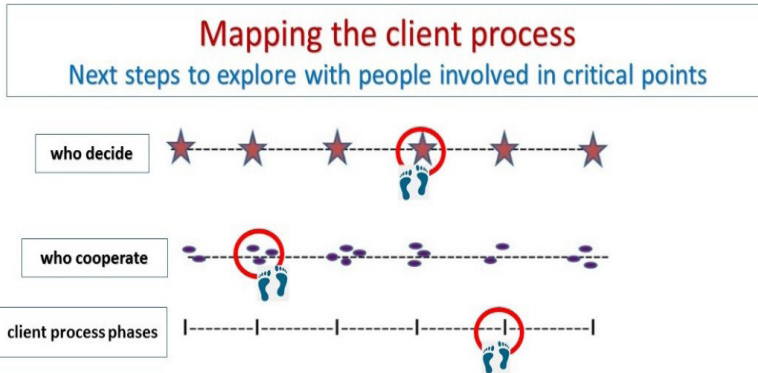
*Phase 2 (10 min)*

B and C interact with A to focus on the critical points of the process: is it a badly designed phase? Is it conflicting interactions? Is there a decision-making problem that slows down the process? Critical points are marked with circles.



*Phase 3 (15 min)*

B and C interact with A to focus on what steps to take to explore with the people involved the nature of the critical issues and decide which interventions may be suitable for development. The observation of the general framework may also be useful to take some decisions directly: for example, proposing to one person to take the leadership of the whole client process which is not governed by anyone, or one may move on to the analysis of a sub-process falling within one of the macro-phases initially set up.



### *Skills to be exercised*

A:

- looking at the organisation from the point of view of the client/ beneficiary process, broadening the usual sectoral view and observing connections;
- defining a “next step” to move the complexity of the process seen on three levels.

B and C:

- helping a colleague by practising coaching not in problem-solving but in problem-setting, trying to open up the awareness of the scenario;
- supporting A to define a “next step” to move the complexity of the process seen on three levels, aware that it is not necessarily the solution.

### *After the exercise*

Having focused on the next step, A will start an exploratory phase to investigate the nature of the critical issues and define an improvement path that may have various outcomes. It will be crucial to clarify whether A will be the leader of the change or whether he/she will want to propose this responsibility to someone else. If the process is not particularly complex, a period of experimentation of the change ideas that emerged should be

established, in which the group of people involved will meet for monitoring. If, on the other hand, a broad change scenario involving many sectors is opened up, it will be appropriate to develop the work with the question and then what is proposed in exercise 7.

## 6. EXERCISE TO EXPRESS THE VISION

*“If you want to build a ship, don’t just gather men together to collect wood and distribute tasks, but tell them about the nostalgia for the vast and endless sea”  
(Antoine de Saint-Exupéry)*

### *Sense and motivation*

One of the key connections in systemic-evolutionary development is that between the change strategy defined at the top and the perception and involvement of the people who have to implement it. In the TRASE path, one finds oneself initiating new processes and involving people who in some way must perceive the meaning and a clear purpose in participating in the proposed process actively and responsibly. Who has the leadership of a process, must have a clear vision of where one wants to go, and above all, one must be able to express it adequately so that others can connect. Since we are not always aware of the effect of our communication, it is good to exercise the ability to express a vision, so that it can inspire the listener, engage them, and help them understand how that vision might affect them in some way. Furthermore, for process leaders, connecting to their vision strengthens personal commitment and helps to focus on the concrete nature of the inspiration, so that there is an inner connection to it. If this connection is not perceived by the listener, it is difficult to initiate a participatory change as the direction is not understood. Expressing the vision can cover various areas: the vision of the future of the company, the vision of a new process, the vision of one’s leadership, etc.

### *Unfolding*

In a group of 4 persons A, B, C, D for 20 minutes per session, everyone plays the role A and the role of the interlocutors.

Total time: 1.20 hours.

*Phase 1 (3 min)*

A prepares the presentation of the vision on the three levels (cognitive, emotional, volitional) trying to make it come alive for the listener, focusing on his/her intentionality.

*Phase 2 (4 min)*

A presents the vision to B, C, D. B listens to the content, C to the emotional part, D to the direction of the will and keeps time. All three also observe the level of intentionality.

*Phase 3 (3 min)*

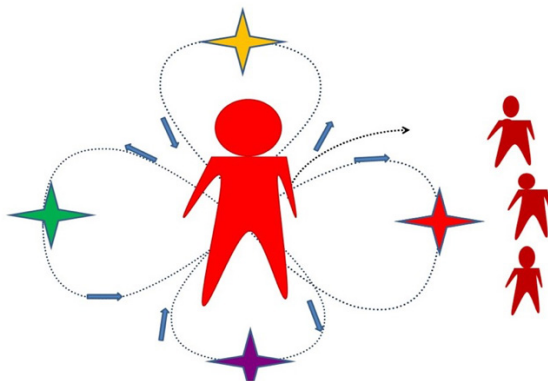
B, C, D reflect and exchange their impressions characterising what they have heard, trying to highlight A's areas of development to make the presentation more effective; this while A listens sitting back from them.

*Phase 4 (6 min)*

A on the basis of what was heard redefines its presentation (3 min) and presents it again (3 min).

*Phase 5 (2 min)*

B, C, D express feedback characterising whether the expression of the vision has improved, whether it is more vital.





### *Skills to be exercised*

A:

- expressing the vision to inspire the listener, trying to highlight the meaning, the purpose (in the case of the organisation, the client's perspective should be highlighted, the link between objectives, results and collaboration);
- being aware of one's intentionality;
- communicating effectively by balancing the emotional, volitional and cognitive aspects.

B, C, D:

- active listening on the 4 levels, focusing on the level of intention, the essence of what A is communicating to us; to do this one's will have to force his/her spontaneous ways of connecting to what he/she is listening to;
- characterising and giving concrete feedback to improve the presentation, imagining how it will inspire and engage future interlocutors in relation to the set objective.

### *After the exercise*

Experiment with expressing the vision when starting a new process, or, if you are in a top position, review the future scenario of the company and share it with the people with whom you intend to realise it.

Exercise this ability also on a daily basis when interacting for development, continuously reporting the sense of what is being done and the direction in which it is going, with the value it has for the client/beneficiary, the corporate identity, the professional development of those involved and the territorial context (if applicable).

## 7. DYNAMIC DESIGN EXERCISE: FROM THE QUESTION TO THE DEVELOPMENT PROCESS

*“Whatever you dream of the undertaking, begin it.  
Boldness has genius, power, magic.”  
(Johann Wolfgang von Goethe)*

### *Sense and motivation*

When the question for development has been shared, reoriented with the working community and ideas for renewing a process or setting up a new one have been collected, experimentation of the collected ideas should be started. This will be crucial to test their feasibility in practice and to see how these ideas can actually be realised in the behaviour of those who will take part in the change.

It is a matter of setting up what we call a “dynamic design”, which after a fixed period of experimentation will give birth to the new. In order to achieve this, there are points to keep in mind, we call them 7 “beacons”<sup>8</sup>, which will set the framework for change and which will be shared within the development infrastructure during the cyclical path. The developer, as a horizontal leader, has to take its steps with the goal in mind, activating people in the pathway, defining an experimentation group, which it will select appropriately afterwards, after the question exploration phase.

It is important that in the group of developers people support each other in focusing on the 7 beacons by exercising specific skills, which are useful in setting up the experimentation.

### *Unfolding*

A, B, C: A is helped by B and C in drawing up the 7 beacons for about 40 minutes, then the roles are reversed so that everyone can define their own process.

Total time: 2 hours.

#### *The 7 beacons:*

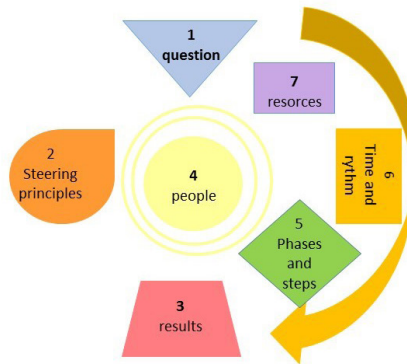
1. The question in its formulation after the exploration and the collected ideas: It represents the reason why one wants to realise the new process, the meaning.

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<sup>8</sup> The 7 beacons, in a somewhat different format, were proposed by Bekman (1995) as elements for taking initiatives. Here they have been redefined and incorporated into the dynamics of the TRASE path.

2. Inspiring principles: What principles will inspire the concrete development of the project?
3. Desired results: Who is the beneficiary/client? What image do we have of the desired results? What evaluation parameters do we give ourselves? What do we NOT want?
4. People/responsibilities: key figures (process leaders, those who give the mandate, those who are experts, etc.), which people should be involved? What characteristics should they have?
5. What steps will the process take, what is the next step in the process?
6. Time and rhythm: when does the process start and end? What rhythm do we give to the monitoring meetings?
7. Resources: What resources make the new process feasible (time, money, means...)?

### 7 beacons for a dynamic design of development processes



### *Skills to be exercised*

A:

- processing the results of the collected ideas by exploring the question for development;
- grasping the framework of systemic elements to be included in the experiment;

- creating the scenario of a new process as the leader who generates it systemically;
- defining the terms of the experiment;
- focusing the experimentation group by choosing not roles, but individualities, also in relation to biographical phases.

B, C:

- listening actively to A in reporting the results of the exploration;
- making concrete the ideas gathered from the exploration to define the 7 beacons; not offer A solutions but help him to enter into the nature of his process on the basis of what has been explored so far, then build on the facts and project possible scenarios in a systemic-evolutionary way;
- helping A to grasp any synergistic biographical links of the people to be involved in the process.

### *After the exercise*

The experimentation phase begins during which the process leader (developer) will share his/her proposal with the community of managers, other developers and the people in his experimentation group. In the rhythmic meetings connecting the development infrastructure, he/she will receive suggestions and feedback for the steps to be taken. The developer will have to make sure that the people involved in the process can make a personal contribution, supporting their areas of development, renewing in the various meetings the purpose of the new process, the meaning derived from the starting question, acting as a horizontal leader. When the experimentation is over, it will be possible to extend the process and make it fully operational.

## 8. EXERCISE TO VISUALISE OUR INNER TEAM<sup>9</sup>

*“Everything can be taken away from a man with the exception of one thing: the last of human freedoms - to be able to choose one’s attitude in any given situation, even if for a few seconds only.”*  
(Viktor Frankl)

### *Sense and motivation*

When we find ourselves in a situation that asks for a personal contribution, we may experience emotions/feelings of fear, enthusiasm or hesitation, sometimes associated with sedimented concepts, representations, judgements, inspiring principles or “hidden guides” that relate to each other and may lead us into unsuccessful repetitive mechanisms or blocking situations. We can see all this as “inner voices”. We don’t hear them unless we learn to listen to them. We can learn to listen to these voices when they speak in the real situations we find ourselves in and also in moments when we reflect on them. The exercise proposes to look at our inner dynamics and set up these voices as a “team” by naming each one, developing awareness and activating our intentionality in dealing with them.

### *Unfolding*

In pairs, A and B for a duration of 30 minutes per session, each doing role A and role B.

Total time: 1 hour.

#### *Phase 1 (15 min)*

As to the actions to be taken in the development process, each person individually reflects and tries to focus on their inner team. Try to listen to the voices that emerge and distinguish them: some are more familiar and obvious, others are more subdued (e.g.: “you are not up to scratch”, “you do not have the skills”, “you have to risk to achieve what you want”, “be careful if you fail you are a failure”, “you can make it”, “the world is made of deception”, “avoid people who do not respect you”...). Each person then draws on a sheet of paper a picture like the one shown, attributing a name, a position, shape and size to the voices: the very obvious ones are bigger, the silent ones smaller, some manifest themselves near others, some are isolated.

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<sup>9</sup> Inspired by the work of Schulz von Thun (1998)

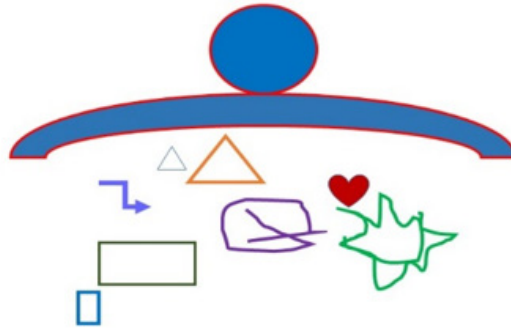
### *Phase 2 (15 min)*

A describes his/her image of the inner team to B, who listens to him/her actively.

B dialogues with A to explore how the voices have entered his/her interiority, their biography.

After a short reflection, B can change the position of the members of A's "team" to help him/her realise the development path he/she is taking.

A observes, reflects on B's proposals and tells him/her how his interventions have worked; he/she decides whether he/she wants to accept them and if so, defines a concrete step to start managing his/her inner team in a different manner.



### *Skills to be exercised*

B:

- active listening;
- taking an initiative to improve A's inner dynamic without offering solutions, but only stimulating to change it;
- connecting with A.'s evolutionary intentionality.

A:

- concentrating on the inner self and define its contours;
- observing how one's inner world influences the outer world and vice versa;
- reflecting on a "different look" at one's own internal dynamics and consider how to transform them;

- experiencing oneself as a leader of self leader by activating the I level.

### *After the exercise*

The person (A) can experience more consciously, during the cyclic TRASE path, how to manage these inner voices. This is important to connect in a progressively more conscious way to the work reality and the interactions it involves, trying to overcome current relational criticalities. Dominant voices can regress, subdued voices can be heard better and this can change the way we act in situations that ask us to bring other parts of ourselves into play than our ordinary, spontaneous way of working, leaving the “comfort zones”. A new side of the personality is shown and one is able to act in a different way than the usual spontaneous way, usually with more confidence and self-assurance.

## 9. EXERCISE TO FOCUS ON FUTURE SCENARIOS

*“Nothing better has the eternal law done,  
than to give us one entrance into life,  
but the possibility of many exits”.*

(Lucius Anneus Seneca)

### *Sense and motivation*

Human beings have the special faculty of being able to anticipate the future. This does not mean planning its realisation in detail, but being active players in the complexity of the events that may happen to us, to steer them in the desired directions. Acting in this way is important when the organisational and/or personal situation calls for radical changes. As we have seen in section 2.1., our intention is a key element in determining the outcome of events. We can say “it is necessary but not sufficient condition”.

It is therefore important that we do our part.

Looking into the future on the basis of what we are aware of today is an important element for development. It will then be interesting to compare reality with our envisaged scenarios, to see which elements were not taken into account and to be able to connect to the future in an increasingly conscious way. We can envisage different scenarios based on desires in our inner world, external circumstances, personal and organisational biographical phases.

Devising and describing possible scenarios, visualising them and sharing them with others, can help us to clarify the most suitable one for our development at the specific moment we are experiencing and to make decisions accordingly.

Once the decision has been taken and the choice made, the process can continue with clear guidance.

### *Unfolding*

In a group of people A, B, C for 20 minutes per session, everyone plays the role A and the role of the interlocutors.

Total time: 1 hour.

#### *Phase 1 (10 min)*

Thinking about the personal criticality/current development question and the biographical phase, each person draws 3 scenarios in relation to a situation he/she feels he/she wants to change.

Scenario 1: Things will continue as they are for the next three years. Changes will come from outside.

Scenario 2: I realise what has always been my big dream and I have a new environment around me.

Scenario 3: Something special happens, which I can only guess at now but do not know if it will happen (e.g. the death of a sick parent, children's choice to change country, a proposal to change location and role...) which may lead me to live in a new reality.

For each of the 3 scenarios, a typical day in life three years later is described. They have to be concrete: what, who, where and how.

Each person reflects on the three scenarios and asks the question: what decision should I make if I want to carry out each of the three scenarios?

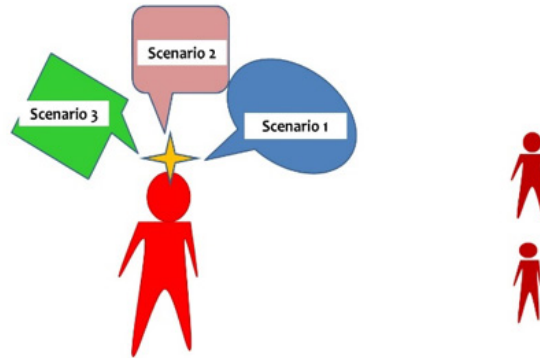
#### *Phase 2 (10 min)*

A: Describes his 3 scenarios to B and C and tells them what choice they require, what decision has to be made in the short term for them to be realised.

B and C: listen and characterise by giving feedback to A on which choice they perceive to be most "heartfelt".

A: with the help of B and C, focuses on the most suitable scenario for its future and formulates useful steps to assess it more thoroughly.





### *Skills to be exercised*

A:

- concentrating on and observing one's past biographical phases and the expectations of future phases;
- imagining the future on the basis of current concrete facts, both inner and outer;
- describing in pictures;
- deciding and define concrete steps to explore a possible future scenario.

B, C:

- active listening;
- observing A's biographical phase and grasp the latent question;
- characterising, expressing what came at a personal level of what was heard;
- dialoguing by giving feedback for action;
- helping formulate concrete steps.

### *After the exercise*

Working with scenarios brings us closer to the future we desire. Once defined and chosen which one is most suitable for the change situation we want to realise, we can focus our role on it.

Through the exercise, participants are supported in consciously defining a future biographical direction that reverberates in their work reality and helps them position themselves with regard to the ongoing change.

The exercise deals with the biographical connection between the individual and the organisation in which he or she works and, depending on the scenario chosen, helps to consciously and actively live this relationship, grasping its personal value.

It is very useful at pivotal moments in one's life when one is confused about what one wants and has the feeling of being "stuck", even with regard to the changes the organisation proposes.

## 10. EXERCISE IN LEARNING FROM BIOGRAPHY

*"The daimon forces us, through need, to take the path:  
the small individual god, the inner Shiva".*  
(Carl Gustav Jung)

*"It will not be a daimon that receives you in fate, but  
you will choose the daimon. Let the first one whom  
fate designates choose the life  
to which he will be irrevocably bound."*  
(Plato)

### *Sense and motivation*

Every human life unfolds in a biography. Being able to observe, listen to and read people's biographies is always very interesting. It expresses the uniqueness of each individual and is the context for the meaning that each person makes of his or her experiences. In the biography, the potential for personal growth and maturity in life emerges.

Our biography can also be a surprise to ourselves at certain moments when we would not have imagined certain developments and directions. It is connected to that of other people through various types of ties: the family of origin, relationships, marriage, children, friendships, working relationships, religious relationships, to which we give our own "style".

Personal biography expresses our individuality, shows who we are in how society and our network of relationships have "written" their characteristics into us. It unfolds according to natural laws, typical phases (childhood, adolescence, adulthood, maturity, old age), but it is also characterised by something unique, peculiar, unrepeatable: our individuality, which begins to manifest itself with the passage of time in the various phases and can largely determine its characteristics.

This individuality is driven by an entirely personal impulse, a leitmotif, sometimes unclear even to ourselves, that shows itself at certain particular moments in life, what Plato called daimon, also taken up by Jung (1935) and Hilman (2009).

Trying to trace the “footprints” of our individuality in the past, trying to focus on our leitmotif, can help us to direct the future of our biography in an increasingly conscious way.

### *Unfolding*

In a group of people A, B, C for 30 minutes per session, preceded by 10 preparatory minutes. Everyone plays the role A and the role of the interlocutors.

Total time: 1.40 hours.

#### *Phase 1*

Each person reflects for 10 minutes and writes down the moments in his or her past life (up to now) when he or she made an important decision personally, inspired by what he or she feels deeply as a personal impulse.

#### *Phase 2*

A recounts the significant events to B and C who help him/her to explore the particular value of the moments recounted: what did he/she feel? What happened? How did the people around him/her react? What did the step mean and what biographical phase was he/she going through? (10 min).

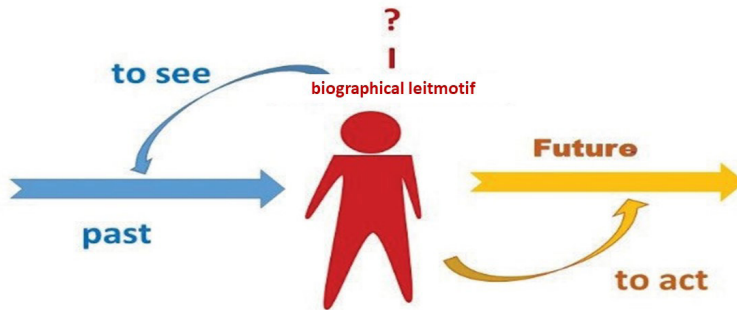
#### *Phase 3*

A, B, C in dialogue try to identify a leitmotif that may have guided the steps taken and that could guide future steps (10 min).

#### *Phase 4*

A with the help of B and C identifies a future biographical scenario that makes sense of that leitmotif (10 min).

## My I between past and future



### *Skills to be exercised*

A:

- observing facts retrospectively with attention to the decision-making process, trying to grasp its essence;
- reflecting on the stages of biography;
- telling the story in pictures;
- working with scenarios.

B, C:

- active listening with a focus on perceiving deep intention;
- observing the dynamics of biography at the level of thoughts, perceptions, actions and direction of intention;
- working with scenarios.

### *After the exercise*

In the development process, one is part of, connecting the leitmotif of the past to new possible scenarios can help one to make the right decisions for one's conscious development.

In general, one can take inspiration from one's leitmotif in daily personal and working life as a guide for choices and decisions. One learns to "trust oneself", to self-determine, while remaining in interaction with the context. When working in development paths, when interacting with people it

is important to train oneself to understand them as “individualities in biographical evolution”, to initiate interactions appropriate to the specific situation, especially if they are to be accompanied in development processes of which one is a horizontal leader.

#### **4.2. Exercises in observation and perception by training the “12 senses”: grasping the implicit**

*“Lack of observation is nothing  
but a form of ignorance and is responsible  
for the prevalence of various pathological tendencies  
and nonsensical ideas”.*  
(Nikola Tesla)

When working in an organisation for its development we have to train ourselves to focus how external reality is observed, perceived and enters our inner world. The process is the same for everyone, but the outcome is different. We have seen, echoing Goethe, that it is the dynamics of the cognitive process, not knowledge, that is objective because, for each of us, the process is the same.

It derives from the connection between perception and concept. The two are mutually connected: perception creates new concepts, which in turn filter our perceptions.

It is important to become aware of our perceptual subjectivity and the concepts we attach to it, in order not to confuse our ideas and feelings with reality.

Awareness of the connection between the outer and inner worlds can be greatly enhanced in the organisational context by training specific modes of observation that can enable us to perceive the context in greater depth. In the course of the action-research activities at the CNR with the IMO International Foundation, we experimented with modes of observation and perception in the organisational sphere that we called the “12 senses”.

These “senses” can be exercised while doing the diálogical or Movcore exercises, but one of the most direct ways of approaching them is to exercise some of them in rotation during a specific day and in the evening write down what you have gathered about organisational life and yourself in your observation and perception. This exercise has been structurally embedded in the cyclic TRASE path by creating moments in which participants share the observations they have collected and the experience they have had.

In addition to the physical senses (sight, hearing, taste, touch, smell), we can stimulate other modes of perception, both in the organisational and personal spheres, namely:

- the “process senses” articulated in: a sense of movement, of life, of balance;
- the “senses of the atmosphere between people” divided into: a sense of gesture, of speech, of thought;
- the “sense of organisational and personal identity”: what is unique and peculiar about that organisation and/or individuality.

In the following, the 12 senses are presented in summary, detailing for each type some key questions to focus and orientate the perception of the organisational context, of the people who are part of it and of oneself as self-perception in the context.

## THE PHYSICAL SENSES

The style of buildings, cars, furniture, the whole physical part of an organisation reveals much about its “essence” and shows many organisational inspirations in their practical impact. How is the organisation “embedded”? Sometimes we find a beautiful façade, but once inside we observe a disorderly and chaotic dimension or the opposite. What does physical reality tell us? How can we perceive it more attentive? What sounds, smells, spaces, colours, physical peculiarities characterise a place, what perceptive experiences can one have and how do these tell us about the reality of that organisation? How can the use of the five classical senses be improved to perceive better and connect more deeply to the organisational context? It is useful to get away from the subjective spontaneous “I like it” - “I don’t like it” mode to make it a tool for understanding organisational dynamics.

### *The sense of sight*

Organisational: trying to grasp the dimension of the space and what it tells us about the organisation, how the environment we encounter speaks to us about its principles, its history and identity (how the spaces are furnished, the colours, the light, the objects, the people I meet, the style, the pictures on the walls, etc). What do we really perceive with our eyes beyond what we see? How does the organisation manifest itself to me?

Personal: how do I evaluate my ability to use my eyesight in relation to what is happening around me in terms of facts and not my own interpretations? What does the way I organise space tell me about myself? How do I see myself in the context?

#### *The sense of hearing*

Organisational: observe sounds well in time, what is heard in a sequential context, because words, unlike spaces, do not return, cannot be listened to again, so one must be very present to grasp their explicit and implicit meaning. The temporal dimension is thus grasped through listening. Certain tones, types of words, rhythms of expression say a lot about the situation and the people who create it at certain specific moments. What kind of sounds, characteristic noises, tones of voice are there in the organisation?

Personal: how do I assess my listening skills? Can I listen to the other person by making space within myself or do I react immediately by superimposing my own judgement or ideas and interpretations on what I am listening to?

#### *The sense of touch*

Organisational: touch can be considered a basic sense. When acting in development, it is essential to exercise the ability to “get in touch” with the situation avoiding prejudices and representations. What tactile experience do I get in that specific organisation? Is the furniture made of wood or plastic? Physical contact also tells a lot about the style of a place: for example, how people greet each other, whether they are relaxed when close, whether they tend to keep their distance.

Personal: how do I relate to the physical reality around me, do I touch it? Can I have positive physical contact with people and objects back to me or do I often remain “detached”? Can I experience myself more consciously with this sense?

#### *The sense of smell*

Organisational: every place and person has a smell that characterises it, what impression does it give me? What information does it offer me? Am I used to perceiving it or do I have to do it more consciously? How do people relate to this topic?

Personal: how impressed am I by the “smell of things and people”? What effect does it have on me? Is it decisive or does it leave me indifferent? Is it an element of connection and/or detachment?

### *The sense of taste*

Organisational: the organisation is also characterised by certain choices that offer a taste perception. How is the canteen? How is the coffee corner organised? What kind of products are there? How much does the taste of the things I encounter speak to me of that specific reality? For example, the choice of healthy or home-made products over industrial products can be seen as characterising that specific organisation.

Personal: what effect do the taste experiences I can have in that organisation and in general have on me? Is this an element of my perception of which I am aware?

## THE SENSES OF THE PROCESS

One can perceive much of the organisation by paying attention to the processes that run through it, often “invisible”, beyond what is codified in job descriptions and formal roles. A good observation point is the client’s perspective. E.g. we go in for an appointment and wait for a long time for the person we have to meet. We are already in contact with a process of the organisation. There are various characteristics of processes in relation to their purpose. It is important to observe the connections between them and whether people work with a “sense of process” or carry out activities that are disconnected from each other. It will be important to observe the following aspects of the processes: whether they are vital, dynamic and balanced.

### *The sense of vitality*

Organisational: this is the perception that allows us to understand whether a certain situation is vital, growing or rigid, declining. The vitality of reality is closely linked to the relationships created between people in a given situation. What do the processes in which people live express to me? Can they notice whether they are developing or declining?

Personal: how do I relate to my vitality? Do I perceive when I am in a personal state of vital energy or not? Do I know how to observe the determining elements of my own life processes and those of others?



### *The sense of movement*

Organisational: this is what allows us to perceive whether organisational processes flow effectively or not. How does the context move? Are the processes fast or slow? Are they interconnected effectively or are there bottlenecks and criticalities? How dynamic is the client's process? Does it show entropy or connection to the context? Do I observe a good rhythm or do we always move according to urgency?

Personal: how do I organise the processes in which I work? Am I slow or fast? Do I have a good flow when moving in relation to the context? How do others see me with respect to movement? How do I observe the movement of others in the way they work? Is my movement driven by an intention or is it externally induced?

### *The sense of balance*

Organisational: it is important to exercise the perception of the balance of organisational reality, as it helps us to focus on the principles underlying the normal modus operandi. Are the processes in balance or is everything concentrated in certain areas creating bottlenecks? Is there seasonality? Do people have a balance between personal/family/work life? When critical issues arise, how are they addressed? Is there a cursory search for the "culprit" or is there an effort to build an overall picture in which the situation is broadly assessed, considering the balance between the various factors?

Personal: how are the processes in which I find myself balanced, also as to the various aspects of my life? Is there a balance between personal/family life, work and inner life? How do I observe the balance of things? Is this something I pay attention to?

## THE SENSES OF THE ATMOSPHERE BETWEEN PEOPLE

Organisational culture is very much linked to how people relate to each other. It is important to train oneself to observe and perceive how they treat each other, whether they are open or closed, whether tense situations often arise or whether relationships are friendly and constructive. This perception can be improved by paying attention to the following specific "senses": how people converse, how they move, what kind of thoughts they express in the way they relate to each other and thus embody organisational processes.

### *The sense of words*<sup>10</sup>

Organisational: the kind of words and style of dialogue normally used in the organisation expresses the kind of organisational culture seen in practice. What style of dialogue can I notice (polite, dialectal, friendly, authoritarian, accusatory...)? What kind of atmosphere is produced? Is it effective for the development of processes? What style and characteristics do I observe in the way people speak (do they often converse, are there many “unsaid”, do they like to clarify differences of view...)? Does what one wants to express usually get through to the other person or can one notice a “monologue” style? What are the principles that guide the words? What style of dialogue is expressed in relation to the client?

Personal: what characteristics do I have in my speech? Does what I want to express reach the other person? What are the principles that guide my words? Can I see them? Do I want to change them or do I consider them effective? What is the biography of my words?

### *The sense of gesture*

Organisational: gestures express much of the relational style, it is, therefore, important to observe how gestures accompany words and what kind of typical movements people make in the organisation. Do they walk with their heads down or look at each other when they cross? What kind of “body language” can I observe? What do people’s gestures express to me? What do the recurring gestures I observe in the organisation mean? How does gesture impact relationships?

Personal: am I aware of my gestures and what I communicate by moving? What is the effect of my movement on others? Am I aware of where my movement comes from? Can I change and improve aspects of it?

### *The sense of thought*

Organisational: when people relate to each other, they express thoughts that are part of a very personal “mental framework”, linked to their own biography and to what they have stored in themselves as concepts, judgements, inspiring principles. One is not always aware of this level of interaction, the observation of which is particularly important in contexts of change. Certain dialogues may be repetitive in style despite the fact that the outcomes continue to be unproductive

10 For the relationship between language and thought, see Vygotskji in footnote 7, cap. 2.

because the underlying thinking behind them is not observed. This also applies to processes: every process has a thought that determines it, that “inspires” it. Can I perceive the thoughts embodied in the organisation? Can I observe the thought that “guides” a certain interaction?

Personal: can I observe where my thoughts come from? What mental structures/inspiring principles can I detect in myself by observing the effect of my actions? Are they effective? Do I want to change them? How do my acquired mental models (inspiring principles, concepts, judgements...) impact my emotionality and what effects do I observe in the resulting actions?

## THE SENSE OF IDENTITY

The sense of identity is what enables us to distinguish ourselves from others. Each one’s I is clearly manifested in the biographical path when one makes choices and overcomes difficult situations on the basis of one’s personal impulse, the leitmotif. Through the decisions, one makes at work and in one’s private life, the perception of oneself as an individual is generated. In this sense, the I is a space of freedom: the intention we put into action is its shaping force, both internally and externally. In processes of change, it is important to exercise the ability to observe the I level of others as a manifestation of this freedom, regardless of each person’s limitations. Manifesting one’s I is a way of recalling the other’s I. There is also the identity of the organisation, linked to its *raison d’être*, i.e. the process it puts in place to satisfy a client/beneficiary by offering goods/services useful to him/her. When this process is not well defined, many problems arise.

Organisational: often the identity of the organisation can be perceived in the pioneer or in whoever represents the “essence” of the organisation with respect to the history and future potentialities in the relationship with clients/beneficiaries. It is good to train oneself to perceive the identity of the organisation in relation to the client’s process. What are the biographical phases? Who acted as the driving force? How does its biography connect to the organisational biography? How have clients and suppliers changed in the biographical phases of the organisation? What development of the organisational identity can we observe in relation to the present individualities?

Personal: it is important to perceive people as individualities in

development, beyond the organisational role. Often, in order to observe this element outside ourselves, it is useful to trace it within ourselves. Can I observe the traces of my identity by reflecting on my past biography? Do I recognise my leitmotif? How do I decide to set up my future biography to develop my leitmotif? Can I see the individuality of the other person behind ordinary behaviour? Can I see the person beyond the role and the personalities he/she wants to express? Can I see individuality in an evolving biography that can be connected to the biography of the organisation?

#### 4.3. Movement exercises for consciousness in organizations inspired by eurythmy (Movcore): experiencing leadership in complexity<sup>11</sup>

*“The brain is able to modify its neural map and functioning in response to physical activity and mental experience.”*  
(Norman Doidge)

*“Getting angry is easy. But to get angry with the right person, at the right time, for the right reason, is difficult.”*  
(Aristotle)

Various neuroscientific experiments documented in a wide range of literature have demonstrated the interconnections between perception, action, emotion and cognition in knowledge/interaction with the world, to the point of even modifying the physical level (Varela, 1991, 1992; Maturana, Varela, 2001; Siegel, 2001, 2010; Doidge, 2007; Gardener, 2002). They have shown that action generates cognitive processes and that knowledge through the senses is the first form of relationship with the environment on which the perceptual and conceptual world is built. The body allows the construction of mental life and its language plays a role as a mediator between the individual and the world, encouraging developmental processes.

On this basis, much has been elaborated at a pedagogical level, but very little for working life. In recent years, one can observe yoga, Tai Chi or meditation practices in corporate contexts, which, although they are of doubtful use on a personal level, are not focused on the very critical aspect of

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<sup>11</sup> See ref. footnote 4

interactivity. Even the movement activities of outdoor training, which have the merit of having shifted the learning processes out of the classroom, fail, however, to create the connection of the motor experience with the reality of work, making its effect in the organisational impact weak.

In the years of experimentation with the HOLIO methodology, in addition to the work with the dialogical exercises and the 12 senses, the learning and development of new systemic competencies was particularly investigated in relation to a movement activity that could facilitate the perception of organisational connections, in addition to those between the constituent components of the person described in section 2.1. The experiments were carried out in development support and training projects in profit (small, medium-sized and multinational enterprises), non-profit and public spheres, as well as in specific projects of local development and placement, the latter focusing on organisational learning.

After 17 years of experimentation and observation of the effects of the perceptive and cognitive amelioration found in the people who took part in the courses, the writer systematised a series of exercises, examples of which are given below, calling them Movcore exercises: Movements for Consciousness in Organizations inspired by Eurhythmy.

The Movcore exercises allow experiencing the development of the main ways in which people are connected to reality (cognitive, emotional, volitional, intention) in parallel with the development of the processes they co-generate. This makes it possible to grasp the synergies between the organisational functions with regard to the creation of value for the client, as a common goal.

This type of exercise is used in the cyclical TRASE pathway in relation to the specific needs for organisational development, also in connection with the dialogue exercises.

Working with Movcore exercises makes it clear that the Aristotelian motto “What we have to learn to do, we learn by doing” applies in the organisational field.

The movement enables the transformation of representative consciousness into the consciousness of systemic-evolutionary action, a fundamental meta-competence of horizontal leadership.

We can call Movcore a “gymnastics of consciousness” that moves the body by connecting people for a common purpose.

In summary, this type of exercise allows you to:

- grasping the value of intention as presence and consciousness in the here and now, developing self-perception in context and stimulating one's development for the common purpose;
- shifting the focus from a predefined result to the process that manages it, highlighting the elements that make it vital (purpose, i.e. the client, form that arises from relationships, rhythm, as vital elements of the organisation, experienced as generated by the group).

Participants are asked to arrange themselves in geometric shapes in the space (circles, squares...) providing keys to understanding in organisational terms (vision, mission, strategy, client, leadership, organisational levels and related processes). They are invited to "move" these shapes by embodying the various aspects of the organisation.

The geometric shapes will become living and will be born from the movement of all in an effort of "perceptive connection", which will allow understanding how to improve one's way of being in the dynamics of the processes, for the success of the organisational purpose.

The exercises can include the exchange of balls/sticks, as a metaphor for the flow of organisational processes in a wider flow of interchange between external and internal, activating mobility of consciousness that will have to guide the body fluidly with respect to the context.

The forms that are created are not static, but continuously moving and with different rhythms, like organisational processes. The participants will therefore be called upon to think about the common purpose and to relate to each other as they move, trying to grasp the right time and rhythm in interaction and to imagine the organisational form in space, as it can be perceived by clients outside the organisation.

Depending on the needs of the specific organisation, it may be necessary to create more or less complex forms, creating subgroups that will then be integrated into a larger form. In this case, the participants will be asked to look for connections between the different forms, trying to grasp the whole in movement.

Stimulating in this way the perception of the broad context, in which one's organisational action is embedded and the harmonisation of one's own rhythm in relation to that of others, helps to overcome certain pitfalls:

- the abstractness of thought that leads to the idea prevailing over the actual process;
- self-referential emotionality that makes us lose sight of what is happening around us;
- the automatism of action that disconnects from others and from the common goal.
- the Movcore exercises, in the various experiments, brought a particular added value to the transformative learning process.

In particular:

- to observe organisational and personal processes according to their peculiarities and search for areas of development;
- to stimulate a broader perception using the various “senses” to foster the acquisition of new personal skills by focusing on key connections between processes;
- to research and to train the observation of what really happens in terms of facts and behaviour;
- to perceive when one activates the leadership of the movement by enacting the intention or “performing a task”;
- to make the experience of the fact that first comes the consciousness, moved by the intention, and then the body, if you want to create a creative flow with the others, otherwise you will have fragmented processes;
- to be perceived when moving inspired by a common image or performing an individual activity disconnected from the context;
- to soften judgmental thinking by using the dimensions of space, time and rhythm to broaden the perception of context and the complexity of connections;
- to stimulate listening on 4 levels (thinking-feeling-willing, I), in movement with others on a non-dialogue level;
- to make the difference between verbal agreement and behavioural harmony perceptible by observing personal and group dynamics;
- to stimulate a searching attitude in the participants to grasp how their way of thinking and perceiving shows up in their actions.

Poetic verses and sounds can be used to help the dynamics of movement.

The exercises are presented in 5 steps:

1. we start with the client's development question and design a suitable exercise;
2. participants are led into a movement experience which metaphorically represents the question, inviting them to observe their own thinking-feeling-willing dynamics with respect to the intention;
3. participants are encouraged to observe and research what is actually represented in space and movement, from the external, client and internal, colleague perspective;
4. a reflection session is proposed on the type of experience lived and the learning generated;
5. in small groups, each person is asked to focus on a concrete next step to work on the weaknesses detected, with the help of colleagues. Often these are areas for improvement that the participants can connect with the other types of exercises proposed in the TRASE pathway, being able to see themselves with increasing awareness, as social subjects in evolution.

It is essential to define the next concrete step, which allows experiencing the learning and new visions generated in the Movcore sessions, stimulating the connection with the concrete work situation.

The "12 senses" are all stimulated in the Movcore exercises, as well as in the practice of exploration/experimentation in organisations: central to this is the sense of the I, which in Movcore becomes visible in the "intention" of the movement, which manifests itself with quite a different vitality from the executive attitude.

As the use of these exercises requires basic skills to be effective, we do not propose the details of the exercises below, but only examples to get a sense of their usefulness in TRASE courses. There are 4 main categories of exercises, all of which take place in relation to the imaginary client watching the movements from outside.



*1. Understanding oneself as an ongoing process*

They serve the development of the personal part of horizontal leadership, self-leadership: the connection between one's constituent parts: intention, thinking, perceiving/feeling, willing/acting, grasping one's movement in space. They can be very useful in Professional Biographical Coaching (PBC) practices.

*2. Understanding the meaning of organisational action: vision and mission*

Consciously being in a collective form needs to be connected with the image (the vision and mission) and make it live in practice. In realising a common form, everyone has to connect with the rhythm of the others and with the dynamics of the overall process. It is a process in which the participants are called upon to "search" for these elements as they act. They move through the form with the front in the middle. It is also very effective in team-building practices between sectors, making connections to the wider context evident.

*3. Understanding client-inspired organisational processes: strategy*

The participants move in the same form as proposed for the mission, but now facing the client. They will have to rethink what was previously realised as a mission, with the front in the centre, now looking at one single point outside the form. The perception of the connections to be activated changes completely.

*4. Understanding the dynamics of internal processes between departments*

The focus here is on the internal interactions of the key processes, always considering the client's gaze, which asks for the clear intention of what is being represented. Various exercises with balls and sticks can be used, representing the moving processes that people exchange.

### 4.3.1. Examples

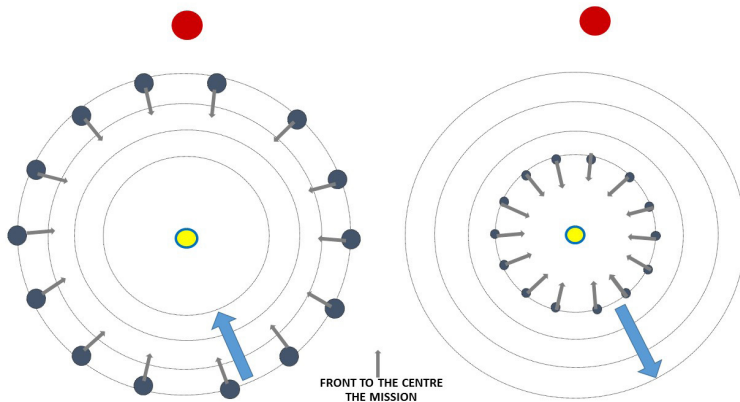
#### UNDERSTANDING THE MEANING OF ORGANISATIONAL ACTION: THE MISSION

*Meaning:* to perceive that the mission derives from connecting with a common image, which must be visible to the external client (the external dot).

##### *Description*

The group is placed in a collective form, e.g. in a circle, which simulates an organisational form, in the centre, it focuses on a point, around which the mission is realised, the reason for being together, the element which connects everyone in the form.

For example, it is established that the mission consists of creating three circles that contract and three that expand, twice, so a total of 12 circles; one moves in a group to achieve this mission and does so with three steps forward and three backward; the circles are not on the floor, but are created in space, so on three levels (legs, shoulders, head).



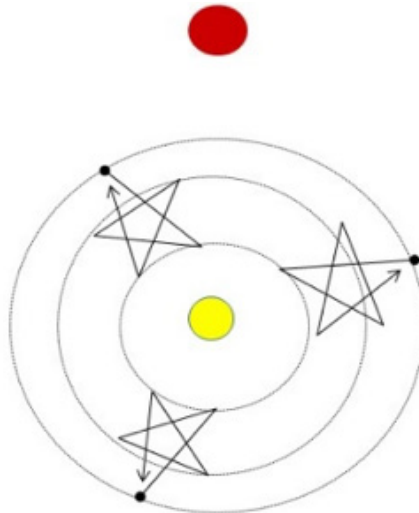
To do this, one has to connect with the rhythm of others and with the dynamics of the overall process. It is a journey in which the participants are called upon to “search” for these elements as they act. In taking the three steps forward, three moving circles are generated which contract the initial form; there is a culmination of contraction when everyone is in the centre and the smallest circle represented; then, returning to the starting point, the form expands again in the three circles, and then returning to the initial large circle, contraction and expansion are performed twice.

*Research task:* to observe whether the three circles are created, and what to do to be able to generate them in a harmonious flow.

*Points of attention:* to generate the image of the circle in movement I must not lose the right and left colleagues; to make the company mission harmonious in the eyes of the client who sees it from the outside it is important to feel the directions (forward and backward, right and left), to represent the difference between working by activities (e.g. the three steps) and working in processes (the intention and awareness of making three circles), guided by a common image. It is useful to bring out that the subject is the leader of the movement, not the doer. This generates energy and connects the personal process to that of the organisation and one can observe the quality of co-operation generated. In order to create three circles fluidly, it is necessary with our conscience to anticipate the position where you are going to go: when you get to the centre you must already be with your consciousness on the periphery and you must connect with others. One must be moved by the image of shrinking and expanding circles; if one only thinks of going one's way, the organisational result is not achieved. One must be inspired by the image that the result for the mission is that "the company produces 12 concentric circles that expand and contract".

The exercise can also be done with more complex shapes: the star, the square, the cross.

*E.g. with star shape*



A task is given to the participants, which is to research and observe what we are actually producing. For example, they produce three types of circles while making a personal star. When this is perceived, then they can do it consciously and with intention, activating the right connections to make the process vital and clear to the client watching from outside.

#### UNDERSTANDING CLIENT-INSPIRED ORGANISATIONAL PROCESSES: STRATEGY AND KEY PROCESSES

*Meaning:* to make perceive how everyone, beyond the internally shared mission, has to relate now directly with the most important element, which is the client, and with various figures of the organisation to realise the strategy in the application of the mission. The client-facing sector has to give the impetus to the movement of the whole organisation and everyone has to connect to it.

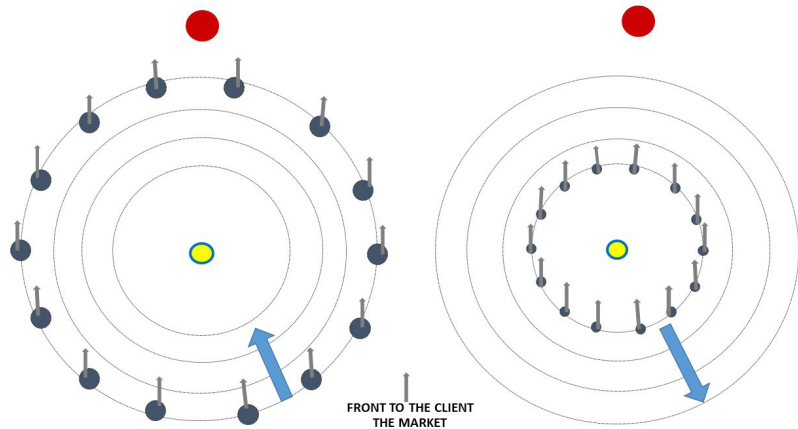
##### *Description*

The group is put into a collective form as before (e.g. circle), now looking no longer at the centre, but all are frontal to the client; the organisation has to operationalise the shared ideas as prototypes in the work of defining the mission (in this case 12 circles contracting and expanding); again, the circles are not on the floor but are created in space, thus on three levels (legs, shoulders, head).

Now it is necessary to represent the strategy which makes the mission operational in the concrete reality towards the client, therefore each one will have to do the same way as before, but with a different front, looking for new connections; who is in front represents the marketing/sales, who is behind the management, who is to the side the staff and middle management.

In order to generate the image of the circle, I do not have to lose my colleagues on the right and left; now the people in front moves first, who does not see the rest, radially from the centre.

You change roles by turning clockwise 15 minutes, this for 3 times so that everyone experiences the 3 key positions: marketing, middle management/ staff functions, directors.



*Research task:* who is now my main point of connection? How do I observe the collective movement to make the flow of the 12 circles successful? What connection experience do I have in each of the 3 positions (marketing, middle management/support, management)? What makes the process fluid?

*Points of attention:* the client becomes the ordering element of the movement, the person in front of the client (marketing) gives the impulse and the whole organisation must connect to it before moving, otherwise the client perceives misalignment. The various points of the represented form must perceive each other; connections are stimulated in a different way than when the front was at the centre, now they are in relation to the organisational functions, which have to connect horizontally, having as an ordering element the look of the client in a more direct way. Directors are at the back and sees the whole form in front, commercial/marketing is at the front, close to the client, middle management or support functions are between directors and marketing and have to connect to both.

#### UNDERSTANDING THE DYNAMICS OF INTERNAL PROCESSES BETWEEN DEPARTMENTS

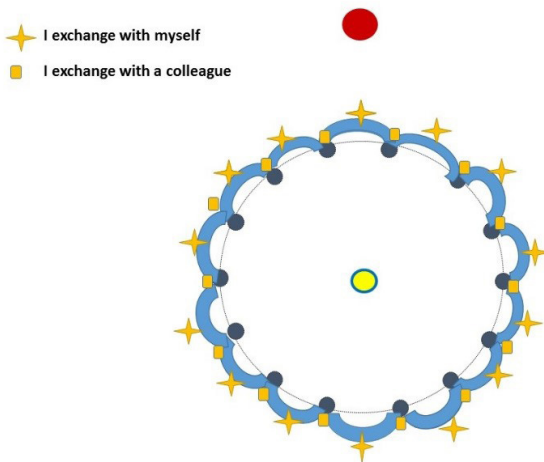
*Meaning:* to bring consciousness to the basic gestures of organisational life, i.e. “giving and receiving a process”, looking at the common design. The client outside observes the fluidity and harmony of the exchanges and whether people move in the collective process creating a common image or perform their task with their consciousness disconnected from the whole.

### Description

In a circle, facing the centre, each person with the little ball (his/her own process) in his/her left hand passes it to him/herself (I manage my process) at the apex of a small arc back to the right, then passes it to their right-hand partner and receives it from their left-hand partner at the end of the arc, this is done four times, then the direction is reversed. Passing the ball to oneself means managing the process, then passing, for which one is responsible, and it is good to watch carefully how one passes and receives, for which one must have confidence (the hand is open to receive). These are two inner attitudes, but also outer attitudes (if I do not put my hand in the right way, I cannot receive the ball, if I do not watch how I pass it, it may not arrive).

The exercise can be developed in various ways by moving the group and the exchanges between the centre and periphery in various forms and in the three dimensions of space.

Is also possible to accompany it with a poem or music, this allows the participants to exercise their sense of hearing and facilitates finding a common rhythm.



*Research task:* what is the common form we are representing beyond the processes we exchange? What is the common process that expresses the organisation? What does my client see? Can I observe myself moving with others? Where is my ball after the first four passes? Which way did it go?

*Points of attention:* observe how the movement of the hand in giving and receiving is fundamental in making the overall process smooth, so everyone has to work on self-leadership, but connecting it to the context.

### 4.3.2. Testimonials

#### Marilena Colli HR business partner company Moneygram Italy (2016)

Initially, I could not understand how the passing of a simple ball from one person to another, while standing in a circle without continuity, could have such a powerful effect on the understanding of certain organisational dynamics, while being experienced all together.

I remember seeing people holding on to the ball and delaying passing it on to others, or vice versa, I saw people passing it so fast they almost threw it.

Personally, I wasn't surprised that I had a rather balanced approach to passing, and above all, I wasn't surprised by the fact that, while I was waiting to receive the ball, or while I was passing it, I never failed to look at what was going on around me, I never lost sight of the rest of the circle and the people in it. Given my university training in Sociology and my natural vocation to pay attention to the whole and the individual elements as parts of a whole, the passing of the ball and my attention to the circle only confirmed, making me even more aware of this, how much my professionalism in the field of human resources is expressed in my ability to listen, to understand the more general context, to "bring together" the various pieces to activate actions to support the organisation in a context in which the internal dimension must dialogue with the external one.

Similarly, at a time when the organisation needed to moving the focus outwards, towards the client, the experience of the ball, the movement and the circle made me acquire an important awareness of which I, as HR, was already suspicious, but which I had never fully realised: while I was receiving and passing the ball in a balanced way, while I was observing everything that was happening around me, at the moment of focusing my attention "outside", where the client was, here I realised that I had no spontaneous attention. It didn't come naturally to me and when there was the element of the client, I couldn't coordinate all the movements, I had to think about it, I had to make an effort.

So from then on, I realised, and I realised it by having the first-hand experience of it, that for my profession as an HR Business Partner I had to start to look outwards as well, to better coordinate the movements between what is inside and what is outside.

Leonardo Langheim project manager brand development. Swiss company Washbar-Triaz (2017)

I met Movcore at the IMO International client day in the Netherlands and asked to use this practice in the company because I immediately saw that it could respond in an original way to the needs that we are experiencing at the moment when we are merging various divisions under a single brand. Our question was related to how to generate collaboration to promote a harmonious merger.

It was useful to work with the movement on the impulse experienced in practice, because we all agree in words, but a different level of common perception was needed to share points of view on how everyone will bring it into their departments in daily practice. With Movcore a “common fabric” was created to work in a new way, a new way of perceiving oneself and the context, which was important to share.

I was struck by the work with space, feeling the warmth around me, giving substance to my movement by filling it with intention. I pointed out to a colleague that the way she was “giving the ball”, it was impossible to catch it. She also does this in her work, but now we laughed together about what she understood, and what she couldn’t put into words.

Now that we have to embody a new impulse, a new identity, which is represented by the new brand, we can no longer use the old ways of relating, because we have seen their limits. We have to start perceiving this in a new way. These exercises were enlightening to show a way of how to do it: to observe, to reflect on one’s own internal dynamics and how they impact the context. It was incredible to visualise in the movement what has been making us fight for years. We don’t understand each other between sectors, each one blames the other for what’s wrong, instead of making an effort to observe how he is passing the process on to the other functions and how he receives it.

The invitation not to talk but to observe was stimulating. The effect on the group of directors was very effective and we thought of doing this with our co-workers once a week. We realised that there is no point in talking about conflicts, you have to observe differently and then reflect on the experience and think about what to do differently.

Ilaria Buccioni, Professor of Organisational Consulting University of Siena, founder of Studio HR - Consultancy firm in Florence (2015)

The work with Movcore helped me to connect the mental process with the flow of movement, which is physical, but also spatial, and creates a perfect



analogy with what happens in the daily practice of working in organisations, bringing out new insights. I am using it in some classrooms as an accompaniment to reflection processes. I always assess the contexts before proposing it and never immediately, so that this practice is appreciated for its value. It is very useful in creating a reflection that generates insights into the perception of realities, even unexpected ones, favouring the creation of new and vital connections.

**Angela Conte, occupational psychologist, health and safety trainer (2017)**

Working with Movcore during the horizontal leadership master's course and in my personal development path has been characterised by alternating phases.

A first important and positive point of reflection came from an exercise that I called "Change of perspective", i.e. changing one's perspective to understand the experience of everyone in the organisation, always looking at the client and trying to perceive the whole.

This exercise gave me the opportunity to experience "putting myself in the shoes of others", i.e. the salesman (a figure with whom I was in constant conflict) who, after all, "put his face to the client". The learning that emerged was related to the perception for the first time of the organisation as a single reality: "we all contribute".

One aspect, however, that made me go into crisis was an exercise characterised by a very fast rhythm. In carrying out the exercise, I felt more difficult than ever to keep up with that pace, which is in fact the company's current pace, which in today's market must always be high for the sake of survival.

I used some small Movcore exercises in the classroom and always found new attention and wonder from the learners when reflecting on concrete facts and taking responsibility for planning a step of personal development. Some learners did the decided step, achieving good results. Their needs very often relate to how to make the movement continuous and fluid in the organisation and of the individual in the organisation.

**Daniela Bottega, consultant at Peoplerise s.r.l. in Padua (2017)**

Movcore was useful for the broadening of my vision on a personal level and as a counsellor, allowing me to become more aware of different issues:

- the value of both the process (e.g. "how I pass the ball") and the final action (e.g. passing the ball);

- the importance for me of the passage of the final ball: if a process does not lead to the final action, how can I improve it?
- the value of “feeling” the whole process and action, not just doing it: what is my body suggesting to me? What emotions am I feeling?
- the value of always having the client/end product in mind and exploring how the group relates to it;
- I am part of a larger system and not everything, today I say, fortunately, depends on me;
- the importance of clarifying the initial rules and principles of the process, making them known and shared by all;
- the importance of rhythm made me appreciate the importance of pauses: there is no rhythm without a pause.

For my clients I find it useful in many ways:

- overcome the threshold of “rationality” by accessing another channel, that of movement, to perceive the context;
- have some suggestions/readings of reality more quickly;
- accessing the “group” dimension by making the dynamics of harmony/disharmony visible: when they are visible to all, this becomes a starting point for common reflection. There is no longer a diatribe between what is “true” and what “is false”;
- bring out the demand for development at the end of the Movcore practice.

**Antonio Cappiello, Organisational development and corruption prevention consultant, Tecnolink s.r.l. Turin (2016)**

Through Movcore, I was able to better understand myself as a social individual. Movcore helped me to balance the cerebral aspect with the physical aspect, reflection with action, thought with the dimensions of space and time. It made me perceive the organisation as the result of what people do together; it showed me the value of concentration and of knowing how to relate individual work to a goal and to the work of other individuals called upon to achieve that goal. Movcore has helped me to mature as a person and as a professional, and the exercises have become essential in my training activities and personal and organisational development. They are very useful when the situation becomes a bit too theoretical when some counterposition is created. The Movcore exercise is always surprising and succeeds in bringing people to the level of concreteness and, surprise for me, people on the level of concreteness do not enter into opposition.

Everything becomes clearer. Thought materialises through bodies moving in space and everyone sees the same scene. In my experience, no one has shirked an exercise. At first, someone thinks of something unseemly, of a game, perhaps not appropriate in a working context. These are the people who are poor in spirit. Then gradually attention and involvement grow in everyone. I deal with anti-corruption with a systemic approach and through Movcore exercises I can make people understand how an organisation can become corrupt, increase their sense of responsibility and focus on social skills, which need to be developed to make the corruption prevention plan realistic.

**Marco Tait, director of Ampeleia s.r.l., Grosseto, producer of biodynamic wine and oil (2018)**

I got to know Movcore while attending the Master on Horizontal Leadership, which was new to me. Welcomed with some “caution”, it taught me to understand how, by having a clear vision of the organisation and connecting with the people around us, the outcome of the process and the development of the process itself are more harmonious and alive.

Another personal learning is the importance of consciously anticipating what the body is going to do; the movement is smoother and lighter, and this is also true in the work if you want to create a flow and avoid fragmentation that can lead to problems.

It is a good tool that I am thinking of using within my organisation with some colleagues. Movcore helps to improve awareness, concentration, stimulates being in the moment and gives value and importance to the group.



# 5 - Horizontal leadership competencies for development in complexity

*with the contribution of Erika Nemmo<sup>1</sup>*

*“It is what we do that explains the notion of identity and not vice versa. Thought tries to read itself in the actions that necessarily precede it: actions precede awareness.”*

(Ludwig Wittgenstein)

## Foreword

As we have seen, the path started with the horizontal leadership methodology for integrated organisations aims at joint development of competencies and organisational processes, supporting a sort of autopoiesis of the system, that is its capacity to evolve while maintaining its unity through the mutual interactions of its elements: clients, processes, people, territory (intended as a local community).

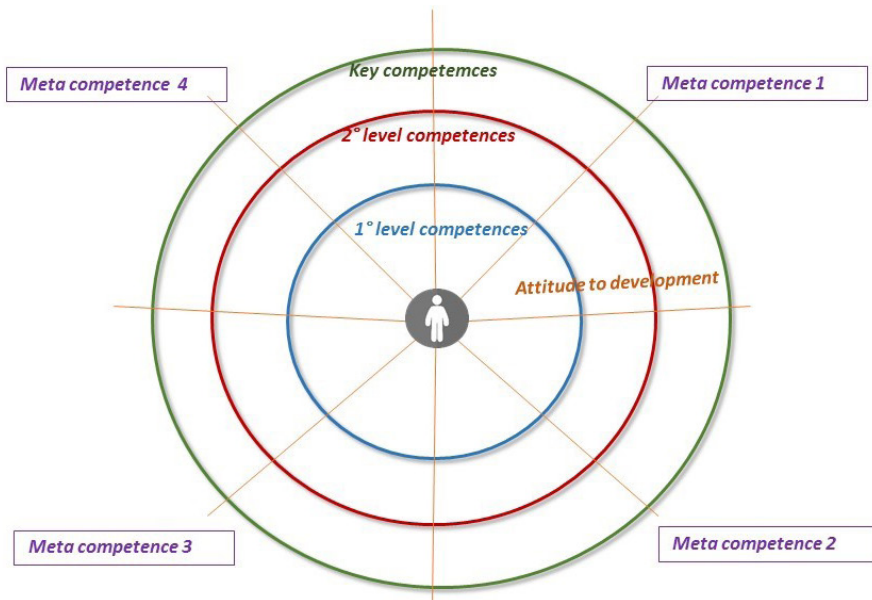
In the previous chapters, we defined horizontal leadership as characterised not by the leadership of people, but of oneself and of processes in which the individuals involved can responsibly act towards a common goal.

To substantiate horizontal leadership, various key competencies and skills are trained during the TRASE path, as already mentioned (cf. 3.2.1.). People who go through a development cycle acquire competencies and meta-competencies, which are a synthesis of the various skills exercised, in a more or less thorough way, depending on the duration of the course. These are competencies, which can always improve over time, but are considered to be sufficiently developed after one cycle to qualify participants as “horizontal leaders”, i.e. people who can focus both on the macro-context and the “next step”, thus generating a personal and organisational development processes. In this sense, it can be said that these are competencies and meta-competencies for **acting** in complexity.

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<sup>1</sup> Erika Nemmo worked for several years at CNR-IRCrES, where she has deepened her understanding of organisational and individual development by participating in action research projects in collaboration with IMO Foundation. She collaborated also with CORIS - Sapienza University of Rome in the field of sociology of work research. She is member of IMO community and coordinate, in a consulting firm, a practice dedicated to people and change projects with a particular focus on the public sector.

The competencies of horizontal leadership are articulated in a framework that we have named “framework of competencies and meta-competencies of horizontal leadership for systemic-evolutionary development”, which is characterised by being structured on different levels<sup>2</sup>, which we will go into in detail later in the chapter.



*Fig. 5.1 - The framework of horizontal leadership competencies and meta-competencies for systemic-evolutionary development*

The systemic character of competencies has three values:

1. connecting the processes of the organisation to the identity purpose of creating added value for its clients;
2. connecting the levels at which we relate to reality (cognitive, emotional and volitional) to the development of one’s social

<sup>2</sup> As mentioned in chapter 1, the framework of competencies and meta-competencies for horizontal leadership derives from the experiments of the HOLIO methodology, which have been carried out over a period of 17 years in action-research projects of the CNR with the IMO International Foundation in profit, non-profit and public sectors. For the part on key competencies, the experimentations started from the results of Bekman’s leadership research (2010) contextualizing them in the TRASE pathway. See Rizziato (2018), Rizziato, Nemmo (2018).

- identity, opening up the possibility, in the context of one's biography, of self-realisation as an individual;
3. connecting personal and organisational system development in a transformative learning process.

We can therefore characterise horizontal leadership as the ability to give an evolutionary direction to the connection between the effects of one's actions and one's inner dynamics, while exploring the effects of organisational action on the client, to improve the service/product offered to him.

The systemic and evolutionary character can be seen, therefore, in a type of leadership based on the synergistic connection between individual and organisational development, which makes it possible to generate processes in which everyone is active for a common purpose.

The evolutionary character of competencies is given by the fact that they are connected with a developmental purpose. That is, with an orientation towards the realisation of individual and organisational potential through a continuous co-creation of "meaning".

Horizontal leadership for integrated organisations is, therefore, both a methodology for organisational and social development and a set of competencies. Competencies that are stimulated in those who take part in TRASE and whose mastery is essential for those who support its implementation (consultants and trainers).

After a first TRASE cycle people, as horizontal leaders, can initiate further development cycles without the support of an expert.

The horizontal leadership competence framework consists of three interconnected levels. Meaningful development of the three levels leads to the generation of meta-competencies. This does not only have to do with the "technicalities" proposed in the exercises but requires the active involvement of the person called upon, within his/her sphere of responsibility, to overcome behavioural spontaneism. In this sense, systemic-evolutionary development is a free choice: the more people put themselves honestly at stake in the process, with the intention of developing themselves and the context, the more their competencies and meta-competencies will reach a level of completeness.

Some individuals may have as personal characteristics "attitudes of developmental propensity" that favour the rapid acquisition of competencies and meta-competencies.

It is on the basis of these attitudes that developers are usually chosen, i.e. those who first initiate the change process. These attitudes, which, regardless of the starting level, are stimulated in the TRASE process, can be summarised as follows:

- moral vision: seeing the organisation not only as a reality that produces goods and services to be sold but as a living community with its own identity that plays an important role in people's lives, in its meaning and significance;
- interest in personal and organisational change: having a desire to change, a drive that does not stop at the first obstacle and respects the sense of work of others;
- inner discipline: taking one's development seriously by experimenting with the proposed way of working, making one's personal contribution;
- integrity: focus on the positive elements and avoid distorting the facts in one's favour.

Let us look at the three levels of competencies and meta-competencies in summary, then described them in detail.

## **Level I competencies**

After acquiring some key knowledge about the organisation and the individual at work, in a systemic-evolutionary perspective, the first step to "move the complexity" is to use much more listening and observation than words, avoiding to linger excessively on analysis, focusing rather on the "next step" to explore the context. In the first level of the competence framework we have the following:

1. Observe the plan of facts and actions/behaviour.
2. Observe and define the client's process and criticalities.
3. Active listening on 4 levels.
4. Describing in pictures.
5. Building "the next concrete step".



## **Level II competencies**

Immediately related to the above competencies, but with a higher level of complexity are the following:

1. Characterise without judging.
2. Define and orientate a question for development based on the critical issues identified.
3. Recognising and transforming the “unconscious inspiring principles” of processes and behaviours.
4. Reading one’s biography and that of the organisation in an evolutionary sense.
5. Dialogue with a view to development.
6. Turning the question for development into a process of experimental development.

## **Key competencies**

Third-level competencies can be called “key” because they are necessary to trigger and foster participatory and sustainable development. To work within the framework of systemic evolutionary development, these competencies are presented to the participants of the TRASE pathways from the very first meetings and there is a recurring focus on how they can be acted upon in practice during the change process. The key competencies are:

1. Inspiring future scenarios.
2. Accompanying people in their development.
3. Designing and guiding systemic-evolutionary processes.
4. Intervening on what blocks the change.

Characteristic of competencies, of all three levels, is that they are action-oriented: they allow to observe and decode the context with a view to the “next step”, to stimulate others to be concrete and, above all, to abandon the logic of problem-solving, based on the search for “solutions”. Instead, they promote processes guided by questions that represent, from an evolutionary perspective, the needs of systemic development. It is an action that derives from the breath between reflection and prospection and, as highlighted in

figure 3.9, par. 3.2 summarising transformative learning, it is an inner and outer action.

## Meta-competencies

The deeper one works on the above-mentioned competencies, the more one will be able to acquire specific meta-competencies that are to be considered as an “existential work in progress”. The meta-competencies indicated below, in fact, have to do with the systemic-evolutionary transformation of one’s way of connecting to reality and consequently of perceiving oneself. In this sense, they should be developed and exercised constantly, because they allow one to consciously live one’s path of self-realisation through a progressive connection with one’s biographical leitmotif.

The meta-competencies are:

1. Systemic-evolutionary thinking.
2. Systemic-evolutionary perceiving.
3. Acting in a systemic-evolutionary way.
4. Systemic-evolutionary self-perception.

As to the widespread conception of what is meant by “systemic thinking”<sup>3</sup>, we believe that the concept underlying the meta-competence of systemic-evolutionary thinking, as we are presenting it, has elements of originality, in that it focuses on the connections between the “human system” and the “organisational system” with respect to their potential for synergistic development. We do not only think about various aspects of the organisational system or the people we come into contact with but in thinking about the various parts of the systems outside ourselves, we trigger a reflection on our own way of thinking. The “person system” is thought of in co- evolution with the “organisation system”.

A new thought process can open up space for new perceptions and for the management of one’s emotional component, which has a strong impact on

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<sup>3</sup> Systemic thinking is understood as an approach to observing contexts that leads to considering the whole emerging system rather than its parts, based on their relationships and interactions, contrary to the reductionist approach, which focuses on the parts and does not envisage and manage high-level models. There are many methodologies of systems thinking that focus primarily on seeing interactions rather than individual elements, covering fields as diverse as the physical sciences, social sciences, biology, etc. See Senge et al. See Senge et al. (2005); Scharmer, 2017; Bordman (2008, 2013); Richmond (2000); Senge, Goleman (2016).

practical choices and contributes to the definition of oneself as a developing subject, with respect to one's biography and the leitmotif that characterises it. A characteristic of meta-competencies is that they represent a radical change in one's cognitive, emotional-perceptive and action processes, contributing to a path of personal individualisation in work, which opens up the possibility of self-realisation, understood as the development of one's own social and personal potential and the conscious creation of one's future biography. The acquisition of meta-competencies is a process that obviously continues throughout life but can lay a good foundation during the cyclical TRASE pathway, always in relation to the research attitude of the person involved, as development is a free act of will, it is not possible to see it as a mere technique.

The three levels of competencies and meta-competencies should not be understood in sequence, but rather in parallel: it is not necessary to master all aspects of one level to the maximum in order to move on to the next one.

The particularities of the different levels are stimulated with different emphases depending on the specificities of the organisation, the types of criticality from which the HOLIO process started, as well as how much the individual invests in his or her own development.

The competencies and meta-competencies that make up the framework are of a transversal nature, i.e. they can be used in different contexts and situations and, apart from technical knowledge, allow one to look at organisational processes and interactions with others consciously and constructively.

The rhythm that characterises the cyclical path of development (between reflection, prospection and action) proposes a path that strongly stimulates a new way of thinking, where the person, in the role of development leader, becomes an actor and, at the same time, an explorer/experimenter of change. For this reason, the horizontal leader becomes the element of synthesis of organisational complexity, no longer one variable among others.

The competencies and meta-competencies generated allow not only the realisation of the integration phase for the organisation but also that of "integrating" the individual as a complex system. They support him/her in overcoming behavioural spontaneity through a better balance of the three ways in which he/she interacts with reality: cognitive, emotional and volitional. This becomes possible thanks to the activation of his/her individuality in the context of his/her own biography and that of the organisation. To summarise, we can say, therefore, that the competencies and meta-competencies of horizontal leadership for systemic-evolutionary

development allow for the evolution of the individual as such, i.e. in relation to both his/her professional and social identity and as an economic actor. They also allow for an evolution of the organisation, which, through its members, becomes capable of self-managing its own changes and the complexity of the market system in which it finds itself.

The framework of competencies and meta-competencies of horizontal leadership, in the experiments carried out, has shown to stimulate the use of a type of intelligence that we can define “organisational intelligence”, a concept more specific than social intelligence, as it allows not only to create good relationships, as claimed by Goleman (2006), but also “good organisations”.

It is an “augmented” human intelligence that will allow the augmented reality of artificial intelligence to be given the right space, so that it does not overwhelm the meaning of work as a founding element of our social identity.

In the following paragraphs, the competencies that fall under each of the three levels of the framework are described in detail, as well as the meta-competencies of horizontal leadership for systemic-evolutionary development.

## **5.1. Level I competencies**

### **Observe the plan of facts and actions/behaviour**

When we experience certain situations, we can focus our attention on different levels: the emotions and feelings, the thoughts and concepts expressed or the facts determined by the actions carried out. While thoughts and emotions are predominantly subjective aspects, we can see that on the level of facts and actions there is a socially shareable reality.

Observing the plan of facts and actions helps, therefore, to trace a shared reality and to identify its distinctive elements without immediately slipping into one’s mental representations or emotional experience, which can be misleading with respect to the development actions to be undertaken.

This makes the individual’s relationship with situations and people more effective from the point of view of change, as it enables him/her to deal with reality by freeing him/herself from quickly drawn conclusions and the associated judgements that very often block change.

This competence enables the following:

- observe “what” people actually do compared to what they say or think they do;

- observe the critical situation in its various aspects with the aim of creating a general image: where the critical event takes place, the style of the place, what people do and say, how they express themselves, who is present, what actually happens;
- looking at reality by recording different perceptions without “polluting” them with interpretations and definitive judgements that tend to simplify and schematise it.

## Observing the client’s process and criticalities

Observing the client process means knowing how to “read” the experience the client has in relation to the different moments in which he/she comes into contact with the organisation (order, purchase, use of the good or service, payment, etc.).

The competence allows a cross-functional look at whether someone really governs the “client process”<sup>4</sup>. Knowing how to recognise and observe it helps to focus and share critical areas, so as to have a concrete basis on which to initiate systemic evolutionary change.

Organisations often implement interventions of change to improve internal efficiency without considering the effects they have on the client’s process, with the consequent creation of further criticalities in the client’s own value chain.

In summary, this competence enables:

- focus on the client process across functions;
- read the organisational criticalities with respect to the ordering perspective of the effect on the client;
- interacting with the various organisational levels to build the basis for initiating systemic connections that rethink the organisation with the client as the ordering element.

## Active listening on 4 levels

Listening is a process of connecting with the other that does not happen spontaneously but, rather, requires conscious effort. It presupposes the temporary suspension of one’s parameters of judgement, ideas and usual ways of thinking. It means leaving one’s cognitive territory, aversions or

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<sup>4</sup> See definition in Foreword to Chapter 3.

projections, and creating an “empty” space where the other can express him/herself.

This competence consists of knowing how to listen in order to focus on the essence of what the interlocutor is saying. It is not just about listening to words, but in a broader sense, listening to the three levels on which we relate to reality. It is, in fact, a listening focused on:

- cognitive level: the thoughts and concepts made explicit;
- emotional level: the emotions and feelings expressed;
- volitional level: the will impulse, i.e. what the person has acted with regard to what is being talked about.

At the same time, one must know how to listen on a fourth level, that of the I, that is, the intention, the direction in which that individuality has moved or tends to move. This level of listening, which is very deep, requires observing the individuality of the other person in relation to his/her possible biographical path. Active listening makes it possible to avoid the typical “traps” one falls into when in a spontaneous interactive mode, such as:

- tending to confirm what I already knew (listening for confirmation - “yes, I already know”);
- tending to listen to oneself (while listening I project myself into the other - “I know how you feel”);
- listening distractedly (I listen paying attention only to content and words - “I don’t look at you but I listen to you”);
- listening in an antagonistic way (while listening I already process the objection - “yes, but...”);
- listening with the intention of finding a solution immediately, often based on one’s own experience and knowledge, which may not necessarily work in the specific case, since one starts from only illusorily similar situations (while listening, I think I have already found the solution - “to solve the problem, you should do this...”).

In short, competence consists in being able to pay attention to facts, to create an image that goes beyond the representative filter, to hold back inner voices (judgement, interpretations, projections), to concentrate on what the

other is expressing as an individual, the essence, the level of individuality, trying to perceive the direction of his will.

## **Describing in pictures**

When working on change, one has to be very aware of communication methods. A well-chosen picture says more than thousands of words. Describing in pictures means telling about a situation, an event, in such a way that the interlocutor can visualise what has happened, just as he or she can see a photograph or film.

The advantage of a photograph is that the image is still and you can calmly look at all aspects: space, objects and people. You can observe their appearance, their position and their interrelationship.

The added value of a film is the change in time: movement, action and interaction make it possible to capture what is happening consecutively and what is happening simultaneously.

The type of interaction described can reveal the culture of the organisation and the inspiring principles of the behaviour of the people present. In a description using images, all senses of perception can be evoked, such as sight, hearing and smell, but also others.

Possessing this competence means being able to report an event starting from the facts perceived as objectively as possible: attention is paid to dialogues, movements in space, expressions. One tries to purge the situation of the emotional elements of the person who experienced it and of subjective interpretations. By reporting only the facts, the interlocutor is given the opportunity to create a more objective image and thus one that is less polluted by stereotypes, prejudices and the emotions of those who have experienced the event first-hand.

Description by images can be used to recount past events and, in this context, creates a very effective mnemonic storage system. Similarly, future scenarios can be described with images and, in doing so, a step is taken towards their realisation as a kind of “body” for the imagination is created.

By describing an event to others by means of images, one allows them to be present during the event and, in a certain sense, to experience it. At the same time the narrator relives what happened from a new point of view and can distance himself from his own prejudices and emotions.

This competence requires concentration and reflexivity. It is good to ask oneself:

- What did I listen to?
- What did I see?
- What happened?
- When?
- Who was present?
- Where did people stand?
- What was the environment like?

If your memory is fresh you will have learned how to choose only the most characteristic details to help the listener visualise the event. When the event is far away in time, you will know how to describe it in the best possible way, giving the plan of the most relevant facts and actions. If little information is given, the situation does not become vivid and the listener cannot “see” it.

In short, competence consists of being able to avoid reporting one’s representations or emotions, proposing instead images that help the listener to visualise and “perceive” the events that have taken place.

## **Building “the next step”**

Each of us has representations of reality, information about the context of reference sees critical points and forms an idea of how they could be resolved. Constructivism and the systemic-complex view tell us, however, that reality is different from how each of us perceives it, it is made up of connections that are most often impenetrable to a detached observer. The variables at play are only revealed when they interact, i.e. only when the various key players take action, “set situations in motion”, making the connections between them visible. Only through interaction is it possible to focus on the true nature of the criticalities and to bring forth appropriate and sustainable ideas for improvement.

When one is faced with an organisational reality that presents complexities, after having exercised the ability to listen to the context without stopping at one’s representations and having constructed an image of reality based on facts, it is necessary to orient oneself towards the definition of a concrete “next step”, also considering the dimension of



the “experience” of those involved. The concreteness of the step lies in the ability to clearly define its characteristics in terms of:

- With whom
- When
- Where
- How
- What

Nevertheless, it is fundamental to clarify that it is seldom a question of a decisive step “in itself”. From the perspective of exploratory and systemic development, each step is one or more actions that move personal and/or organisational complexity towards a future scenario which, to a certain extent, can be reconsidered downstream of the step. Every time a step is taken, the system reveals aspects of its complexity that initially could not be foreseen, which is why a sort of spiral path is implemented through which, after each step, the reality is observed anew and it is verified that the profiled scenario is actually possible before taking a further step in that direction.

The logic of the “concrete next step”, which replaces the logic of “planning the whole path”, opens up generative scenarios: the working community is explored and change is experienced by activating systemic connections, which allow all vital parts of the organisation to be gradually integrated towards sustainable scenarios.

The defining competence of the next step, of course, does not only concern the “organisation system” but also the “individual system”. In other words, it also has a fundamental value in personal development. Changing behaviours and habits is never easy, not only because they are rooted in time, but because they are the result of complex inner balances. It is therefore unthinkable that the development of one’s areas of improvement should take place on the basis of a generic wish, but it is necessary to implement, day after day, small concrete actions that differ from those implemented in the past. Faced with criticality in one’s way of managing a meeting, for example, one goes from saying “I will try to be clearer in the meeting” (generic wish), to defining an action clearly defined in the objective and space-time dimension: “I will prepare the map of my speech and do a test 5 days before with a friend of mine to ask for feedback on the clarity of the presentation. Then I will integrate the suggestions in the exposition”.

## 5.2. Level II competencies

### Characterising without judging

When working in development contexts, it is essential to be able to get out of the “game of roles”, typical of the vertical and hierarchical structure, to activate interactions in a perspective of the evolution of all the elements of the system. Therefore, also the quality of interactions should be cultivated from an evolutionary perspective, a dimension that is only possible if one avoids immediate judgement, which closes the exchange and blocks the creativity that can be generated among people.

When describing an event in images, one is, in a certain sense, reviewing the situation and trying to make the interlocutor participate in what is happening, thus facilitating active listening.

Characterisation, on the other hand, attempts to extrapolate the characteristics of a situation that have been individually perceived through a process that avoids judgement. This ability consists in returning what has been subjectively experienced, trying to grasp the peculiarities of a fact or story. With respect to the same image, everyone is struck by different parts. It is therefore a question of giving the interlocutor a subjective vision of an objective fact that concerns him and that can help him to see himself and the fact from another point of view.

Characterisation, as a subjective experience, is, for the subject expressing it, right in itself, because it has no character of objectivity. In other words, each person can experience an objectively existing fact in a subjectively different way and how it was perceived cannot be questioned. Unlike a judgement, which focuses on the other, characterisation starts with oneself. That is why there is no point in discussing whether a characterisation given by someone is correct or not, it should be experienced as a “gift” which, if useful, can be taken into consideration or simply ignored.

For example, if in the story the person describes an event in which he/she is clearly not involved, but in his/her mode of expression one of the listeners perceives anxiety, a characterisation could be “I got anxious”. This does not mean “this situation makes you anxious”, a judgement which could be the subject of a debate (e.g. “no, it is not true that I have been anxious, why do you claim this?”), but concerns the subjective way of perception of the characteriser. This kind of feedback on what was heard is useful for the person who narrated to reflect from another point of view on his/her involvement in the event, especially if several listeners express similar characterisations.

To understand the subjective nature of characterisation it can be a useful example refers to a very concrete object such as a tree. How do I characterise a tree? It may be liked or not. You might find it useful or not. You might think that a beech tree is more beautiful than a birch tree. All these observations, however, say something about the person making them, but very little about the object itself. Through characterisation one tries to take a step forward. When looking at a beech and a birch, for example, characterisation can be used to highlight their differences<sup>5</sup>:

- birch: airy and bright; delicate and playful, with a fashionable presence;
- beech: robust and quiet, protective, firmly rooted in the earth, strong presence.

Characterisation is always a personal expression. It is personal because not everyone immediately recognises what we have associated with certain objects as characteristic. Nevertheless, it is possible, in principle, for others to see the characteristics expressed because they somehow belong to the object or fact. Obviously, the more skilled one is in the art of characterisation, the more others will recognise the given characterisations in the object or fact.

It remains, however, that characterisation is a subjective experience, connecting the external fact (the story told through the images) and the internal subject (the feelings created by that story). By characterising, therefore, it is inevitable to say something about the external fact, but also something about oneself.

Having acquired the competence to characterise allows you:

- to stick to the story heard, the image displayed;
- to do not extend characteristics to the narrator. Do not use expressions such as “you are ...”, “it is typical of you ...”. Of course, it is possible to say something about the narrator and the way he/she told the story, using expressions such as: “It came to me from you that...”;
- to formulate the characterisation concisely, trying to express them as if they were the title of a film or a book;
- not to focus on the skills and characteristics of the narrator or the actors in the story. Characterisation is not about how fascinating or entertaining a story is but helps give the narrator a broader, intersubjective view of the story.

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<sup>5</sup> See also Locher k., Van der Brug J. (1997)

## **Define and orientate a development question on the basis of the criticalities observed**

Critical issues emerging in organisational contexts lead to the different representation of the problem at the base.

This is normal as everyone reads reality according to their own mental constructs, their own ability to perceive the context, as well as their own experience and position with regard to the criticality in question.

Discussions to convince others of one's own reasons are often unnecessary and usually much emphasis is placed on problem-solving skills. Problem-solving is certainly useful for dealing with small and big problems that arise within the work routine, but it is not so useful within a process of organisational development. Problem-solving, in fact, is based on the ability to give quick and immediate operational answers within contexts that are not complex. When, however, one seeks to renew organisational processes that involve several people and functions, the fundamental ability is not so much that of finding ready-made solutions as that of working with questions, in a problem-setting perspective, that is, of constructing a general scenario.

The competence consists in passing from the vision of a critical reality as a problem to one as an opportunity for development, after having read the criticalities from the point of view of the effects on the client. Formulating critical issues as a development questions is the first step in order to share the future process of change at various organisational and functional levels affected by the problem.

An immediate solution only requires to be implemented, a development question, on the other hand, requires to be shared, re-oriented in a path within which others can also express themselves and, if necessary, activate. Development questions can be defined as "slow" compared to problem-solving questions, which are more immediate. They are the "catalysts" of the various aspects of organisational criticalities: the client's experience, how collaboration takes place, the (dis)connections between processes in relation to their purpose, the attitude and competencies of the person taking the leadership.

Formulating critical issues in the form of a development question is not a mere grammatical exercise: our language, the way we describe what surrounds us, is closely linked to our perception of it, and seeking the right formulation and reformulation of the question, while exploring it with the working community, places us in an important dynamic of transformative learning.

Development questions are future-oriented questions (how can I/we...?), they are not cognitive (why...?). They are concrete, i.e. they are based on real data shared by all, they are expressed in unambiguous language and they are open, i.e. they are oriented towards different possible scenarios without explicitly or implicitly containing a solution.

The competence to work with questions is transversal: it can be applied to different aspects of one's personal, social and working life. It is a way of relating to reality which, in the work environment, is connected to the sensitivity and understanding of the evolutionary character of the organisation: critical points are considered as a moment of transition for which it is necessary to create a development process that links the past with future evolution.

Moving from the observation of criticality to the formulation of a development question opens up a process of progressive sharing and awareness of the real need for change. The question will be formulated and reformulated several times in an exploratory path until it reaches a shared concreteness which will allow to define possible improvement actions.

The competence to define and direct a development question requires:

- to observe recurring criticalities in their own organisation and how they are experienced by those affected;
- to clarify the profile of clients and observing how critical issues reverberate on what is called the "client process", i.e. the various experiences the client has when coming into contact with the organisation (e.g. sales, administration, delivery...);
- to define the key variables of the context to be developed, collect objective data and facts and experiences in relation to the facts;
- to involve and activate the people who are most likely to develop changes in order to check the question, redefining it until it is shared, collecting ideas for improvement;
- to consider three basic elements for sustainable change during the exploration process: who is interested in the change (the responsible person), the centrality of the beneficiary of the development (client/user) and the motivation and commitment of the people involved.

## Identifying and transforming the “unconscious inspiring principles” of behaviour and processes

Much of what an individual does, irrespective of the effectiveness of his or her behaviour, is driven by certain “inspiring principles” that are often implicit and unclear even to those who implement them. This can lead to relational criticalities that are recurrently repeated.

Hidden inspiring principles are ideas, judgements, prejudices, imposed rules, repeated practices, acquired over time (at school, in the family, in previous work experiences, etc.) which have been consolidated within behavioural habits, creating real automatisms. These automatisms more often than not make it possible to deal effectively with the task at hand, but the fact that they are often unconscious means that they are also used in situations where they are completely ineffective. That is, some hidden inspiring principles guide behaviour that turns out to be dysfunctional. Often, moreover, the principles that inspire thoughts are different from those that inspire action and this creates further criticalities.

To exemplify, one could say that a manager who cannot manage to delegate any of his activities, although he has difficulties to carry them all out, might have as an “inspiring principle”: *I have to control everything*, or *only I am capable*, or *I do not trust anyone*. It may also happen that, instead, he/she perceives him/herself as a delegating subject who “knows how to work as a team”, according to an inspiring principle of thinking such as it is right to delegate.

An implicit inspiring principle, such as the first one in the example, influences behaviour even when it is not useful for achieving a certain goal. In this sense, it is an “unconscious inspiring principle” or “hidden guide”: it is, however, observable on the factual level.

As with individuals, organisational culture is also based on a series of implicit assumptions, “inspiring principles” that have led those working in the organisation to structure processes in a certain way rather than another. For instance, if in an organisation all documents must indistinctly be signed by the general manager (which inevitably creates a bottleneck), then the “inspiring principle” of the organisation might be: *only the manager can take responsibility*.

Competence consists of identifying the underlying inspiring principle of a recurring criticality (personal, of a colleague, organisational), transforming it and testing its concrete implementation.

Consciously changing the personal and organizational inspiring principles can really transform the way of working, allowing to start a process of generating a new culture at work lived in practice.

In the case of personal inspiring principles, strong conscious activation of the intention in self-development is necessary; in the case of organisational inspiring principles, the intention will be in the direction of creating added value to the client's process, as it represents the meaning of organisational life, its identity. For horizontal leaders, this intention determines the direction of systemic-evolutionary development.

### **Reading one's biography and that of the organization in an evolutionary sense**

Our biography is characterised by events that we have partly chosen and partly not. They have also determined a biography of our thoughts, our emotions and our modes of action. In addition to these three elements, we can also identify a biography of our "I", driven by a particular leitmotif. This competence consists of recognizing one's personal leitmotif, i.e. what drives one to make decisions of particular importance beyond the influences of one's environment. Identifying this leitmotif can help one to plan future steps in life and the organisation, orienting and living one's future biography more consciously. Reading this level allows one to give continuity to the "road" that has already been instinctively traced in the past or, vice versa, to recognise the need for a change of trajectory. In any case, however, coming into contact with the individual biography allows us to touch our deepest essence.

Those who possess this competence are able to identify the typical phase in life. This is important in the process of change, both to orientate oneself and to choose the most suitable persons to collaborate in the new scenarios that are being defined. It is also able to identify the biography of one's thoughts, inner dynamics, and modes of action.

Organisations also have a biography and an identity. They start from an intuition, an initial idea to offer a product/service and from the modes and principles with which it was chosen to do so. All this is reflected in the client who, it can be said, make visible the identity of that organisation and its development over time. This happens in the way they use the products/services offered.

From the very beginning of the organisation and throughout the development of its biography there are moments of crisis, transitions and

changes which have to do with the pioneer, with the people who have successfully taken over the responsibilities and with the transformation of the relationship with the client.

Being able to read and investigate the biography of an organisation and to observe one's own and one's colleagues' biographical stages, helps those responsible for change to recognise the nature of the present questions, to see the sense of their own role and of those who could be agents of future development and possible partners for change.

Organisational development is only effective if it is linked to the development of the people working in the organisation, i.e. if it is able to offer individuals the opportunity to evolve in the direction of the meaning of their own biography, their own leitmotif. It is a competence which enables a deep connection with the meaning of one's work.

This competence consists, in short, in knowing how to read the personal and organisational biography and in exploring possible scenarios of virtuous convergence between the two, orienting oneself starting from the needs of the client's process.

## **Dialogue in terms of development**

Orienting oneself in complexity by exploring questions of development and experimenting with new systemic and evolutionary processes, requires a different kind of dialogue than one is used to in the ordinary. It is necessary to avoid discussions that presuppose trying to convince the other person of one's reasons, which is often a long and exhausting operation, as well as useless in complex situations. The systemic-evolutionary vision of the person, which is a prerequisite for the possibility of an integrated organisation, implies the awareness that to move complexity, the key instrument is the generative action of systemic change.

Those who possess this competence are able to engage in action-oriented dialogues and the definition of a concrete next step, in a relational dynamic in which the interlocutor is recognised as the owner of the change. Action is evoked in a pathway that moves between reflection and prospection, using many of the competencies described above. This type of dialogue presupposes active listening on four levels, the ability to take a biographical look at the situation, to observe inspiring principles of behaviours and processes, to describe through images, to characterise. It also requires a strong capacity for observation and perception, broad and contextual.

Considering that development activities are normally placed side by side with ordinary activities, the former should be not time consuming. It is



necessary to focus on helping the other person to define his/her next step, giving him/her a very concrete help to act, in terms of who, when, where, what, how. It can be an organisational or personal step.

Acting on this competence makes it possible to avoid analytical and intellectual discussions, which lose the perception of the context and defocus the possibility, implicit in it, of transformation. It makes it possible to work with an “intelligence of acting”, which has other characteristics than that of “understanding”. In contexts of complexity, action precedes understanding by reflecting on the actions taken, we can understand what was previously implicit and plan a “next step” capable of transforming the situation.

The development dialogue is therefore not analysis-oriented: it does not focus too much on cognitive aspects and avoids problem-solving. It is important to observe and to grasp the individual element of the interlocutor and its relation to the criticality and the demand for change that may arise, activating him/her to take initiatives. Focusing on concrete steps that the person can take helps to “move” his/her representations of the dialogue topic and opens up new possible scenarios for action, in the logic of the transformative learning process (cf. par. 3.2., fig. 3.9).

Dialogue in development terms means being focused on the essence of what the person is conveying as an individual, beyond words, helping them to choose the right direction for personal and/or organisational improvement. This kind of dialogue is based on suggestions for action rather than “good advice”. If, for example, the suggestion for overcoming the critical situation of a person who is tense in work meetings is: “take a break and immerse yourself in your life”, we will be in a position to express what we think is “good” for the other person, but we will not give any suggestions on how to act. Our interlocutor may perceive such general advice as being out of touch with his or her world and may feel that he or she has not been understood. Even if the suggestion to take a break was a good idea, the other person would not know how to implement it because his character is too ill-defined. One has to imagine the situation of the other person in concrete terms. A good suggestion is “ready to use”. For example: “My suggestion is that for three weeks before the Monday afternoon meeting, you take a quarter of an hour for yourself and walk around the block alone. During this time you also think about what you want to say about the agenda of the meeting”.

Acting out this competence means that everything that is intuitively perceived in the dialogue can be translated into a concrete situation in which the suggestion becomes “visible”. It does not have to be a piece of big advice. The smaller and more concrete the advice, the more effective it will be.

In summary:

- while characterisation relates to personal feedback on what was heard, the competence in question relates to making suggestions so that the person can take concrete steps;
- one moves from the level of representation (description by images - cognitive level) and characterisation (restitution of the perceived - level of feeling), to activate the plan of action: what do I actually do about the criticality that the described situation has brought to light, not necessarily to solve it, but to explore the most effective possibilities for improvement;
- suggestions for action must take into account that a concrete step is one if you have defined: what you do, who you involve, when, how;
- avoid “good wishes” advice (e.g. you should be calmer) and focus on what the person could actually do;
- the suggestion is not discussed because it comes from a personal and therefore subjective perspective; the interlocutor can decide whether to accept it or not.

The development dialogue aims at supporting the other person as a leader who, through concrete steps, contextualised in a vision that will emerge between reflection and exploration, it will be able to undertake personal and organisational systemic-evolutionary development.

## **Transforming the question for development into a process of experimental development**

After orienting and defining the development question with the working community and gathering ideas for improvement, a possible development process of an experimental type can be designed. This is fundamental in order to allow the complex interconnections between subjective and objective variables to compose themselves in new ways of working.

This competence consists of being able to initiate a “dynamic design” which focuses on the coordinates of the new process, but also on the limited context for the experimentation and the people to be involved.

In order to initiate dynamic design, it is, therefore, necessary to be able to define aspects such as:

- the question in its formulation after the exploration and the collected ideas: it represents why the new process is wanted, the meaning;
- the inspiring principles: what principles will inspire the concrete development of the process?
- the desired results: who is the beneficiary/client? What image do we have of the desired results? What evaluation parameters do we give ourselves? What do we not want?
- people/responsibilities: who has what role (final responsible, who gives the mandate, who is an expert), which people should be involved? What characteristics should they have?
- the phases of the process and the next step in the planned phase;
- time and rhythm: when does the process begin and end? What rhythm do we give to the monitoring meetings?
- resources: what resources are needed to make the new process feasible (time, money, means...)?

The design of these elements supports the implementation of experimentation which allows testing the effectiveness and feasibility of the ideas collected to improve the criticality in question. The design is defined as “dynamic” as, after each step, it is necessary to look at its outcomes to assess the need to modify one or more elements of the experimental path.

The person responsible for the specific development process is the horizontal leader who, after the testing phase, can lead the change to full operation, with the collaboration of the testing group.

In the “horizontal space” for systemic connections, defined “development infrastructure” (cf. par. 3.1.) the steps of testing new processes are supported by considering the conditions of feasibility which will be shared between the various functions and levels of the company. In this way the change is tackled gradually, generatively and therefore effectively and sustainably, avoiding blockages and obstructions, aware that it is in the experimentation that the difference between a problem-solving activity and a development activity lies. If the process did not provide for the possibility of being redirected on the basis of the attempts made, the ideas tried out, the improvements that can be made in practice beyond what has been thought out, we would find ourselves faced with a mere implementation of an already codified solution,

which often proves ineffective in the face of organisational complexity. Experimentation, on the other hand, allows for a shared reflection and evaluation of the change, thus enabling, if necessary, a reorientation of the process.

### **5.3. Key competencies**

The first and second level competencies are the basis for what we call the key competencies of horizontal leadership. They are practised in the cyclic TRASE pathway and, after a first cycle, to a large extent they are acquired by the participants.

Below is the description.

#### **Inspiring future scenarios**

It means knowing how to give people a vision of where they are going and the sense that the path has for the client and the growth of the organisation. It is a question of relaunching the sense of development by reconnecting people to the impulse that gave life to the organisation, the peculiarity of the service and/or product offered to clients and how today this impulse is renewed and becomes central to the vitality and health of the organisation.

The vision of the future has to “move” people in that direction, so it is important to create meetings where there are opportunities to creatively exchange ideas for innovation. Precisely for this to happen, the ability to inspire in relation to the construction of a future scenario is important. It allows us to express what motivates and excites us in the project, proposing a clear vision of change, making people perceive the sense for themselves and the organisation of the proposed development scenario.

#### **Accompanying people in their development**

This competence consists of being able to support and stimulate the leadership of those involved in development processes so that everyone can take steps and acquire new competencies.

When proposing to someone to be part of a change process, one has to consider that new challenges of personal and professional growth will arise. Therefore, it is important to be able to support others in perceiving difficulties as opportunities for development and not as elements of destructive self-criticism. This competence consists of being able to accompany others in their organisational and individual development without overlapping

or replacing them. By cultivating the practice of active listening, it will be possible to support them in observing the areas of improvement that the development challenges bring to the surface, and through a development dialogue, which constantly avoids judgement, one stimulates their ability to take concrete steps, to get moving.

## **Designing and guiding systemic-evolutionary processes**

It means knowing how to define the coordinates of a new process and choosing the right people to start the generative path. Change processes cannot be designed at the drawing board but can be planned in a “dynamic” and experimental way.

In general, it is a question of knowing how to think in terms of a process, be it simple or complex. If we think, for example, of the need to support a person in his or her development, we realise how important it is to design an adequate process in terms of timing, meeting rhythms, the balance between listening and dialogue, focus on an action output. In the same way, it is possible to design the process of a meeting so that it is conducted effectively by foreseeing the right times and rhythms, a balance between contents, interactions, space for decisions and definition of responsibilities.

The systemic-evolutionary process is characterised by having a purpose, the desired result, a time and a rhythm, subjects who are part of it with certain roles with respect to the purpose, and phases, which are not rigid but exploratory-experimental before coming into operation. While ordinary processes are typically functional, development processes are horizontal, across functions. Therefore, this key competence allows:

- define the process from the point of view of added value for all key components of the organisation: client, people, capital, territory;
- choose the people who will take part in the course as horizontal leaders, i.e. actors who are able to take actions to make a personal contribution to the process and at the same time acquire new competencies for development.

## **Intervening on blocks to change**

This competence consists of being able to be incisive in changing what has been started if something is not working, to ensure that the process remains healthy for the organisation.

When critical situations arise in the development process, it is sometimes necessary to “change course”, to make a further change. However, it is not always easy to intervene because emotional, personal and interpersonal elements distract one from the responsibility of being a guarantor of healthy processes and thus of organisational well-being.

This competence leads to knowing how to take uncomfortable but effective positions for the organisation, always considering clients, people, capital and the territory as key elements to be valued. Exercising this competence means avoiding blockages and repeated criticalities, making concrete in actions the inspiring principle that: “the organisational identity is given by the client”, aware that guaranteeing this principle is the best way to take care of the common good. It means being able to say that as the person acts the role is not effective, bringing concrete facts and confronting them directly, in order to evaluate the change to be implemented accordingly.

One will be able to effectively express one’s point of view without losing contact with the other, making one “see” the critical issues on a factual level, not an emotional one, taking a balanced position to protect the process, which concerns a large community.

#### **5.4. Meta-competencies**

*“Thinking causes the soul, of which even the animal is gifted, to become spirit”.*  
(Friedrich Hegel)

When a good level of maturity is reached in the above-mentioned competencies, one begins to assume modes of thought, perception, action and definition of one’s own identity that we have called “systemic-evolutionary”. Therefore, meta-competencies are acquired, which, in a certain sense, will never be complete, as they are linked to a development path that can last a very long time and is conditioned by the subject’s will to explore the overcoming of one’s boundaries and comfort zones. The presented meta-competencies are strongly interconnected. They are summarised below.

#### **Systemic-evolutionary thinking**

It is a matter of being able to revitalise one’s thinking activity, being agile in reflecting on “how one thinks” and how one’s inner world is mirrored in the outer world and vice versa, considering the different factors of a situation. One begins to see in a systematic way what has settled into concepts like the

“object” of one’s subjective thinking, thus being able to start freeing oneself from unproductive mental patterns from past experiences. One will then be able to experience the very process of thinking as a “living” thought, which has a very different character from the usual spontaneous thinking, moving it with intentionality linked to the common good. In this way, it will be possible to distinguish facts from interpretations, which makes it possible to observe reality itself without flattening it with subjective reactive modes and to look at it through the glasses of the developmental “question” implicit in the situation.

Possessing this meta-competence means being aware of and responsible for one’s thoughts and intentions and their influence on reality, becoming cautious in expressing judgements about oneself, others and the situation. Through this way of thinking, one can work systemically by envisaging scenarios, intervening imaginatively and gathering new, previously unthought inspirations, which allow one to intuit which steps are appropriate to take. We can therefore say that systemic-evolutionary thinking is characterised by three elements: imagination, inspiration and intuition.

## **Systemic-evolutionary perception**

When thought is dynamized by breaking out of its patterns, new spaces of perception of reality open up. One gets out of the dynamic well summarised in Anais Nin’s phrase “We do not see things as they are, we see things as we are”. One begins to perceive broader visions and perspectives, thus grasping fundamental elements of the processes and their aims. For example, one grasps their vitality, if they are balanced, the thoughts embodied in them and the interlocutor as an individual, beyond the role.

These perceptions have a very important informative bearing on the processes of systemic development. Through this type of perception, it is possible to perceive reality in a less disaggregated way, as images in which everything is interconnected, it is our representation that tends to divide. We begin, therefore, to perceive processes and relations as a single reality in the organisation.

From new perceptions, we can activate personal learning processes, but also gather inspiration to create new scenarios that bring added value to the organisation in its fundamental parts: clients, people, capital, territory.

## **Systemic-evolutionary acting**

When we can get new inspirations with respect to organisational life, this also opens up new spaces for guessing what the best action can be in the context, what systemic action to implement, which has an evolutionary character for the key factors and the future of the organisation as a living community.

This meta-competence consists of being able to immediately connect action and its effect, in a perspective that does not separate reflection and prospection from action and considers them as a fundamental part of its evolutionary character.

Knowing how to evaluate the effect and consequences of actions, in connection with the initial intention, is fundamental to achieving generative paths of sustainable change.

## **Individualising in a systemic-evolutionary way**

The process of individuation is a process that makes our existence vital in all aspects: personal, work, family. It is the generation of one's own identity.

In the working environment, one's identity is linked to the sense of one's work in relation to the personal contribution one makes to the improvement of the client relationship. This depends on being able to take the initiatives and decisions. Self-perception has to do with a choice: to take a step or not to take a step, to take one direction or another, to create space for the growth of others or to keep them in an executive role.

This competence consists in being clear that the health of one's individualisation process is strongly interrelated to that of the people one comes into contact with in one's working life: clients, suppliers, colleagues, bosses. When dialoguing and/or making decisions, it is therefore crucial to consider not only oneself but also the other person as an individual in a process of individualisation. Interacting on this level brings value and substance to personal self-fulfilment, to others' and to that of the organisation as a human creation, to which collective work, aimed at serving the needs of the society, gives it a clear identity.



# 6 - Cases of application

## Foreword

The proposed methodology has always been applied to start from an agreement with the management/owners on the overall vision, building little by little a development infrastructure, varying according to the cases, but always including the connection with the realisation of a horizontal vision at the top and at the bottom, so that the two elements are connected in a generative path of the new, both at the level of processes, bringing added value to the client, and of competencies, developing the staff and the collaboration. When top management is not involved, it is difficult for development to take place.

Four Italian and two foreign cases of the IMO International network are described below. It is also reported the declination of the methodology in the International Master on Horizontal Leadership, which received in 2019 the special mention of the AIF<sup>1</sup> “Adriano Olivetti” Award for the innovativeness and experientiality of the teaching.

It should be noted that the biography of the methodology in Italy is linked to the project with the CNR, which saw the Olivettian impulse converge with the work of the IMO International Foundation, further elaborating them over 17 years of research and experimentation in the field.

In the other countries, although sharing the basic assumptions, there are some differences in application, which represent an enriching element within the IMO International community, today active in more than 400 clients in 11 countries<sup>2</sup>. The following are the cases of a German bank and a hospital in Brazil.

For the Italian cases, three organisational types were chosen: a family business, a medium-sized municipality, the Italian headquarters of a multinational company<sup>3</sup>.

### 6.1. Family business - Azienda Agricola Foradori

#### The situation

This is a family-owned wine company founded in 1930 near Trento.

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<sup>1</sup> Italian Association of trainers.

<sup>2</sup> cf. footnote 5 ch.1

<sup>3</sup> Cases refer to the period before 2020.

In 2002 it converted to biodynamics and today exports excellent wines to 35 countries. It employs 15 permanent and seasonal staff. The company structure has recently expanded from the owner, Elisabetta Foradori, the third generation, who has led to significant development, to her three children, with the prospect of starting a path of differentiation in other agricultural sectors and animal husbandry, in a broad scenario of development of the territory. This transition required a reorganisation and empowerment of the company's people. The owner wanted to break away from wine-related activities and focus on expanding into other sectors. In 2018, she was attending the IMO master's course on horizontal leadership and asked for support for the moment of transition.

### **Question and development infrastructure**

The entrepreneur's initial question was: *How can I reorganise the company in such a way that wine production becomes autonomous to free up my time so that I can take care of development in other areas?*

Work began with the new owners and their children, sharing future scenarios and rethinking the company's macro-processes with a view to the different types of client. The relative responsibilities of the macro-processes were established, the critical areas were focused on and the relative development questions were identified, for each of which specific leadership responsibilities were identified, thinking about the suitable figures in the company. A group of developers was thus defined, who would work on the questions that emerged.

The macro-processes outlined by the type of client were as follows:

- importer/distributor client;
- representative client (for the region Trentino-Alto Adige);
- direct private client (wine, fruit and vegetables and cheese);
- client "local community in Trentino".

Some of the questions that emerged in the macro-processes were as follows (not all are given, but only a few examples):

- *How to speed up the closing of the budget?*
- *How to develop the "local direct client" process with the inclusion of horticultural products?*

- *How to improve order preparation?*
- *How to improve the order management process?*
- *How to improve machine maintenance and bottling?*
- *How can we streamline the administrative and managerial aspects of complying with laws, regulations and certifications?*
- *How to improve the management of wine registers?*

After sharing the assumptions of the HOLIO methodology, it was agreed that we would work in a 6-month path with 6 meetings of 2 days at 20-day intervals, according to some specific new inspiring principles:

- we work from the perspective of clients who connect activities into meaningful processes;
- we work with leadership processes;
- we work on change in an experimental way;
- we work in a spirit of mutual leadership support;
- we work with attention to the process we are in, quality of dialogue and purpose, biography, looking at the personal situation and connections with work;
- we work with an awareness of the area in which we are acting: family, ownership, management.

It was also agreed that each meeting would work separately with the owner, with the developers and then in the connection between the two groups. Between the meetings, group learning and Professional Biographical Coaching (PBC) would take place, both remotely and in person. During the course, everyone would practise the skills to become a horizontal leader. Between meetings with the consultants, the ownership and the developers would meet in specific “connection meetings” in which each would update the group on the developments of the explorations and experiments and receive suggestions for steps to be taken, both on an organisational and personal level.

It was finally decided that the next step would be to present the entrepreneur’s new vision to the working community, as well as to propose the development path using the HOLIO methodology.

## **The cyclical path and the exercise of horizontal leadership**

The second meeting took place with the ownership and all staff. The founder proposed her new vision for the development of the company and the necessity to change the organisational culture in the direction of activating and empowering everyone. This would allow her to free herself from wine-related processes, to develop other branches of the company, given the need for active and responsible management as an evolutionary moment for the whole working community. The children, who were recently members, also expressed their vision of the future and the connections with their mother's vision.

The consultants proposed the fundamentals of the HOLIO methodology, sharing with the extended group the new inspiring principles of the work proposed by the owner, who then exposed the development questions that emerged from the criticalities of the macro-processes, highlighting the possible leadership. After a moment of reflection in groups and the positive acceptance of the proposals and methods of change, the entire working community was involved and activated. Sub-groups then worked on the development questions and steps to explore them in order to bring ideas and proposals to the next meeting. At the same time, ownership worked on strategic development questions related to the identified macro-processes.

With specific dialogue exercises and Movcore, was immediately experimented with ways in which everyone could work on overcoming their own relational spontaneity by entering into new attitudes of listening, dialogue and the generation of new processes, as identified by the property, but also by taking the initiative and proposing.

By the end of the second meeting, everyone had focused on exploratory steps.

It was also decided to start a weekly "connection meeting" between owners and developers to support each other in exploration and development actions and to generate together a new organisational culture lived in practice. It was defined that the leadership of this meeting would be rotational and that it would be run with a focus on 3 aspects: content, interaction, a decision on the next steps.

It was asked to pay much attention to the style of dialogue: the development connection meetings are not an area of discussion, but of interaction and exchange to help those who have responsibilities to focus on the next steps (for now mainly exploratory and/or experimental) useful for their process. Each person should have a defined time limit of max. 10 minutes in which to briefly present 3 main points: the ideas he/

she is exploring/intends to test, doubts/criticisms, possible next steps, to be defined after a tour among the participants to collect suggestions.

It was agreed that it is fundamental for those who have the leadership of the meeting to guarantee the essentiality of the interactions, pointing out that suggestions from colleagues for a concrete next step are to be considered as a "gift": if they are liked they are accepted, otherwise they are thrown away. This is to avoid useless discussions: there is no point in discussing suggestions that always come from partial visions, sharing that only the leader of the process can evaluate what can be useful, taking responsibility for it.

In the following meeting with the consultants, a reflection on the results of the first connection meetings and the exploration of the development questions was started: the questions explored led to the emergence of other critical relational and operational issues on which to work.

It has been agreed and experimented that those active in development when they encounter critical issues and their inspiring principles, will have to be able to assess whether they are consistent with an effective client process and, if not, will have to explicitly seek to modify them, pro-actively transforming the process and sharing the new principles with colleagues, thus initiating a process of renewal of the organisational culture.

From the ideas that emerged in the exploration, possible processes were defined for experimentation, which was supported in subsequent meetings.

The developers, acting as horizontal leaders, started to make a strong connection between individual and organisational development to make development concrete. A significant part of the path was the support with Professional Biographical Coaching (PBC), which helped to solve critical relational issues in the experimentation of processes: by re-focusing on facts and inspiring judgements/principles of oneself and the interlocutor, people were supported in seeing themselves and the interlocutor as individuals in a subjective as well as the organisational development process. Taking a development step in one's personal context meant unlocking the development of the process in the company and vice versa.

## Results

The initiated processes have produced in about 6 months a strong change in the company: many critical processes have strongly improved, leading also to economic development. Horizontal leadership skills are maturing in the responsibility of the processes, but also and above all allowing new

ways of relating. For some processes, the experimentation phase is being completed. The working community started to work systematically with connection meetings and learned to support itself. The founder and part of the ownership are starting to realise the new vision of the development of the company in the agricultural and zootechnical sector and development of the territory.

## **Testimony of Founder Elisabetta Foradori**

*I started the journey with IMO Italy driven by the need to help myself, my children and the people involved in our organisation to manage the change and transition from “monarchical” management (the mine) to a different one, because the generation and structure of the company today are different.*

*Ours is a family business that has gone from the pioneering phase linked to my figure to a differentiation phase focused on efficiency and optimisation (but lacking in client contact). We then embarked on the third phase a few months ago, reconsidering our work activities in terms of processes, to try to move towards an integrated organisation.*

*Going to define the future identity of the company led us to consider our biographies and their connections with this new identity.*

*In particular, the often difficult distinction of the spheres in which we act together on a daily basis (family-ownership-management) has taken on a different form, supported by the work done on hidden guides, on the acquired awareness of the sphere in which we act.*

*We are thus developing (of course not every day is the same and sometimes a lack of willingness to listen to the personal needs of others takes us backwards) a sort of anchoring system which supports us both in the interaction of family dynamics and in the new work behaviour in the company, which is experimentally based on horizontal leadership.*

*Working on the quality of dialogue by observing one’s inspiring principles has led us to avoid reactions that are often not very conscious.*

*Wonderful work on ourselves that came as a gift, exploratory work on a personal level generated a different quality of dialogue.*

*So I started from afar, thinking about the company and its evolution, and I found myself on a path of personal growth as a woman, entrepreneur and above all as a mother. The greatest gift today (even though we are still experimenting) is being able to perceive my children differently, to have acquired a new awareness of my interaction with the people around me, to*

*be able to sit around the table with the whole “community” of the company, talking to each other and trying to support each other in change.*

*An extraordinary human and collective journey that I never imagined would be possible.*

## **6.2. Medium-sized municipality - Ruvo di Puglia**

### **The situation**

Ruvo di Puglia is a municipality of about 25,000 inhabitants and employs about 100 people. The new administration, which took office in 2016 had an ambitious mandate programme to be realised and wanted the support of the working community. A meeting had been organised with all employees to announce the new objectives of the council, which wondered how to give continuity in practice, having found a certain detachment of staff. The mayor then thought of starting a new performance evaluation plan to stimulate more participation.

After an initial orientation interview with the author, and after examining some concrete and recurring critical points in relation to the low level of participation, it emerged that there was a mismatch between the objectives of the political side and the routine activities of the organisational side, which showed a very self-referential picture between the various sectors.

It was therefore concluded the traditional performance evaluation in this area would not help the achievement of the mayor’s objectives, and it was decided to initiate it in the face of a development strategy that could offer employees room for initiative and growth in relation to the new council’s programme.

The question, therefore, became: *How can we activate the working community to implement the mandate programme and improve services to citizens?*

### **Questions and development infrastructure**

The project started with a first orientation workshop of the development question with the group of politicians, represented by the mayor (the institutional part), and the management group, represented by the municipal secretary. With them, the cornerstones of the HOLIO methodology and the initial question were shared.

From that question, work was done with the two groups to see what it meant to develop a concrete process that could be a suitable way forward for the shared aims.

Both groups expressed the need to work more closely together before involving employees in the change.

The question emerged from the political group: *How to connect strategy and operations?*

The following questions emerged from the management group:

- *How to decide together on priorities and operational realignment of the set?*
- *How to generate the DUP (Single Programming Document) in a shared way?*
- *How can we optimise the process of our meetings?*

The two groups then focused on the questions to be proposed to the working community. It was agreed to propose the questions to a selected group of individuals, based on personal attitudes of openness to change, and then to involve the whole working community in a cascade. It was not easy to share the fact that who would take over the question was not to be chosen according to hierarchical responsibilities, which would have reproduced the old patterns.

The questions that emerged were as follows:

- *How to involve citizens in detecting/reporting criticalities and needs?*
- *How to create and communicate the Municipality's Social Report?*
- *How to involve citizens in administrative bartering?*
- *How to generate an effective debt collection process?*
- *How to build the municipal kennel?*
- *How to create a lean process for productive construction?*
- *How to communicate services and transparency to citizens?*
- *How to start the digital transition?*
- *How to speed up payments to businesses?*



Possible developers were then identified, who were offered, in a special meeting preceded by some personal interviews, to take responsibility for a question and to develop it involving the working community. It was agreed that this would be done with new working principles, with horizontal leadership in the view of the integrated organisation and with an exploratory and experimental approach, where everybody would be involved to improve processes and competencies in an interconnected way.

Some candidates accepted, others expressed concerns and proposed variations on the initial questions, others asked to be allowed to develop other questions they felt were important (we do not give all the details here).

After the final decision, the time and rhythm of the development infrastructure were designed: two “horizontal” communities (management and development) were created, which would work on their specific question and meet at a fixed time and rhythm to assess possible needs and connections. The political side would attend the meetings, if not in full, at least with a representative, who would then report back in the institutional meetings.

It was decided to make a 4-month course, with 4 meetings of 2 days, one month apart, interspersed with professional biographical coaching (PBC) sessions.

Each meeting included: a half-day session with the two communities separately, a half-day session for the connections between the management and the institutional side, and a final half-day session for the connections among the three groups.

## **The cyclical path and the exercise of horizontal leadership**

At the beginning of the meetings, the assumptions and articulation of the HOLIO methodology were shared.

The start of the exploratory phase of the developers’ applications called for special attention to be paid to overcoming the initial mistrust of the way the political and management side worked. It was thought unlikely that the working style could be changed, especially by the political side. However, thanks to the prearranged networking meetings, a common effort to review the approach to work by taking responsibility as horizontal leaders began to be perceived.

The management community was the backbone of the change. In order to work on its own development questions, it decided to meet once a week in a very different way than in ordinary administration. In turn, the group

members took over the leadership of the weekly meeting to establish work priorities and to define a joint formulation of the DUP (Single Programming Document), which was previously realised in a fragmented way and close to official deadlines. The management style of this kind of meetings was defined with a very tight rhythm, without entering into contradiction or debate, considering the meeting as a process.

Points of attention were:

- contents: they are defined beforehand and each one has a defined time to present;
- interactions on the established points for 5 minutes in pairs and return in plenary for reflection in terms of ideas for “action”; avoid discussions and focus on supporting colleagues in dealing with critical issues;
- definition of next steps and timeframe before the next meeting.

The purpose of the meeting was also:

- recognise itself as a community of management, but also of promotion and support for development;
- increasingly understand the necessary connections to be made between the different areas of the organisation to achieve goals and programmes;
- assessing how to take care of the connections with other communities operating within the organisation (political, development, whole work community).

One of the most critical issues in the work of the management community was that the various managers could not arrive on time at the fixed meeting every Monday from 11.30 to 14.00.

The reason was that they had various emergencies in their respective departments. It was discussed and agreed that the inspiring principle of this criticality in reality, beyond what was intended and stated, was: *my ward comes before the general objectives of the municipality*. It was therefore decided that it was necessary to change this inspiring principle to the following: *the general objectives of the municipality are the framework in which to focus the improvements of my ward. All agreed that as a concrete*

*step it was necessary to work in advance on the organisation of one's own area in order to be in time or the commune meeting. This required a learn and shared intentionality.*

To highlight and work on this criticality, the management community was invited to carry out a movement exercise (Movcore) to experience the connection between the activity of the Department Manager and that of the member of the management community. The exercise made it possible to “see” in action, in the metaphor of movement, what was happening in reality and thus to focus on how to take action to overcome the criticality.

Particularly useful were the connection meetings between the two communities, which made it possible to overcome initial prejudices regarding common goals, understand the difficulties and support each other with information and exploration results. They offered a space for suggestions and support for the realisation of what was desired with the initial development questions.

At the end of the course, the two communities and the political party presented the results of the experiments to the whole working community, which was invited to express its development questions, thinking about the additional value to be given to the citizens with regard to their own point of view. This led to ideas for starting new development processes for which the proposers had the possibility to take personal responsibility. The management community took over the responsibility to support the new ideas with targeted meetings, and the political side, positively impressed by the staff's willingness to cooperate, declared its intention to support this way of working in the future.

## **Results**

The project fully achieved its objectives. In summary:

- creation of three interoperating groups to guide and monitor the development process focused on improving the service to citizens;
- creation of innovations in operational processes or experimentation of new processes (a dozen) in the application of the political programme;
- cross-functional working methods of the Management Community with a focus on Management and Control processes and a new process for generating the DUP;

- Widespread acquisition of horizontal leadership skills and competencies, improved performance and generation of a new feeling within the organisation and confidence in the change process.

## Testimonials<sup>4</sup>

### *Mayor*

“I have been surprised by this approach, which gives centrality to the person, who can become a leader, regardless of his or her role in the organisation, in order to achieve what is the purpose of the Municipality, namely the good of the local community”.

### *Councillor for Culture*

“We are generating an organism, we have definitely abandoned the term organisational machine. We have changed the perception of what we are doing and the context in which we are operating”.

### *Councillor for Personnel*

“The thing that impressed me most was to find that many employees who were placed in less visible positions had the opportunity to give their best, and not only did they not back down, but also made valuable contributions”.

### *Municipal Secretary*

“What was proposed was an enlightening organisational approach to managing development in practice and made us realise how we can move from the power of “I” to the power of “we” with horizontal leadership”.

### *Some developers*

- “At last, politics has come down and stood by our side with the will to change itself and improve work, and for this, it has asked us for concrete support”.
- “We used to work in watertight compartments, but now we can see the municipality more broadly”.

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<sup>4</sup> Extracts from the video testimony <https://www.youtube.com/watch?v=D-AyphdJDKs&feature=youtu.be>

- “Exploring the question and outlining the process allowed me to interact with many areas. I didn’t even know about and was important because it awakened my consciousness and my thinking”.

### 6.3. Multinational company MoneyGram - Headquarters Italy

#### The situation

The Italian branch of the multinational MoneyGram is a money transfer company which was founded in Italy and subsequently acquired by the US group. The staff had a strong connection to the entrepreneur who had later sold the business and to the approach he had given to the work. There had been an experience of positive working cohesion, very client-oriented, but not at all oriented to the management of complexity and matrix organisation proposed later by the multinational management. The business, which remained the same after the take-over, was still money transfer, a service largely used by immigrants to send money to their families of origin, who did not have access to banking services and current accounts.

At the time of the meeting between the writer and the HR manager, the company was organised in silos with direct hierarchical reporting to the process operators of the parent company in Dallas (US). This created conflict in the Italian group, as directives often did not meet the needs of the local client and the sectors were unable to cooperate to resolve critical issues, as they reported to US managers who were not present in the area and were mainly interested in enhancing the value of their sector and in the rigid application of procedures aimed at centralising the control of locally managed processes.

The needs of the HR sector was to propose meetings in which a climate of dialogue and openness was created, given the tensions, inefficiency and complaints of clients not satisfied with the service received. An initial meeting with Movcore exercises, designed for the specific need, had allowed the perception of unity with respect to the various sectors, with the focus on the client and thus the need to collaborate as a Italian group and share with the US Head Quarter, the Italian client’s critical situation. After a few months, the company’s policy had fortunately been defined on the basis of focuses that were pushing in the desired direction. The 2016 vision included four key points: the client at the centre, working together for the purpose, defining a common strategy, managing the risk (client first, we are MoneyGram, managing the risk, strategy). The management of the Rome

office, which acted as the Headquarters for the South Europe region and for operations in 19 countries, then set out to implement the new vision with the support of IMO consultants.

## Questions and development infrastructure

Work started with the HR function and the Head of the South-European area, sharing the necessity that already from the management team a vision coherent with the 4 key points should be outlined, developing a widespread leadership in the company.

The question shared at the outset was defined as follows: *How to achieve the vision 2016 by overcoming the logic of silos?*

The following image was then defined to be shared with the group of Directors, acting in a very fragmented way.



This image inspired Money Gram's living vision for 2016 and the 4 priorities that required strong leadership work to be pursued

The core group of directors (community of directors) was identified and met to share the common vision for the development of the Italian office. The principles of the HOLIO methodology for development in complexity and the exploratory/experimental logic were proposed for new processes and competencies. Working with specific exercises, they were then asked to define macro-objectives and to focus on the most critical areas for achieving them, reflecting on the criticalities of the processes managed

by each, but from the common perspective of the client, considered in its various types. A series of “macro-development questions” emerged, for which the managers decided to entrust the leadership to a selected group of developers (community of developers). The group was then delineated and it was decided to extend the intervention to a large part of the working community to generate a new culture. Thus, 3 groups of 20 people were created, as community of developers, in addition to the group of directors.

The directors were then invited to present the common vision for the year and the new working approach for change to the various groups, asking them to take initiatives to develop the critical areas represented in the “macro-areas of development”.

The question on which the group of directors would work, besides the first definition of the macro-objectives, was: *How to define a strategy consistent with the living vision?* From the macro-objectives, it was a question of defining specific objectives in a “horizontal” logic, whereby the sectors would have to interact to define strategic objectives in a connected way, with a cross-functional/silos approach.

The groups of developers then took up the macro-questions and were invited to propose also the development questions which from their point of view were important to achieve the presented living vision. Groups were then generated in relation to the areas of the relevance of the questions, and the leadership of the macro- and sub-questions was defined.

A development infrastructure was designed for 7 months with a meeting every 15 days: one with the group of directors and one with the developers. The connection meetings would take place in the first hour of the developers’ meetings, which would be attended by the community of directors.

## **The cyclical path and the exercise of horizontal leadership**

After the presentation of the vision to the groups and the new working principles, the managers then proposed the macro-questions. Here are some examples:

- *How can functions improve the quality of telephone client support by increasing first call resolution as a percentage?*
- *How can internal departments modify their current fraud management to minimise the impact on SBA and clients?*
- *How can the commercial side measure the quality of the service provided by the support functions so that it is in line with client expectations?*

- *How can internal departments improve onboarding processes from the point of view of time reduction and volume planning?*
- *How can commercial functions develop appropriate KPIs to enable Business to measure the quality of the service provided to the final client (agent)?*

For some of them, the developers defined sub-questions. For example, for the last macro-question, the following sub-questions were defined:

- *sub-question 1: How can we identify and classify the needs of our agents?*
- *Sub-question 2: Which support functions should be involved as they generate a service that impacts the agent's experience with MG?*

In the cyclic path TRASE the questions were explored and then the developers presented to the directors group the ideas to be developed with the 7 beacons, outlining possible new processes. They were then realised by assessing priorities and resources needed, within the framework of the connection meetings.

A lot of work was done on horizontal leadership skills in both groups.

One of the major difficulties that emerged in the group of directors was that of acting simultaneously in the two roles: directors for the management and horizontal leader for development, which was solved within the TRASE process.

## **Results**

The projects were completed in accordance with the objectives set at the beginning of the consultancy and the competencies exercised started to generate a new organisational culture. Between the two communities, it was possible to test an effective way of working independently, but also in connection. Unfortunately, however, at the end of the experiments, it was not possible to realise the implementation of all the new processes, because due to a change in the top management of the Head Quarter in US and a new policy, the company decided to restructure the business in Europe by rationalising activities, reducing personnel costs, reducing the number of apex roles and redistributing their responsibilities centrally.



## Testimonial - Marilena Colli - HR business partner

*When I think of development teams, the themes that come to mind are engagement, collaboration, cross-functionality, connections, identification of the critical issues, development of projects, proposals and concrete improvements of processes, creation of meaning.*

*When we started our journey in the direction of organisational development, the company was part of an international context with a centralised decision-making process overseas, with a complex matrix, organization where in open space, although sharing the same physical working “space”, which should also have facilitated communication between people and between departments, we found ourselves in the same office, sitting at a desk without really knowing what our colleague sitting at the desk opposite was doing.*

*In the meantime, “town halls” and “cross functional” meetings were organised remotely, “dotted lines” (multiple reporting lines) existed, almost all functions, including HR, had project managers to implement cross-country projects.*

*Nevertheless, the organisation was running in “silos”, non-communicating compartments. The corporate objectives were readily communicated, the corporate direction defined, but there was no clear execution, as if the fact of having clear corporate objectives, which was certainly a fundamental step, had as a direct consequence their automatic and systemic achievement. Each function was called to decline these objectives up to the most operative roles of the organisation according to a mechanism typical of a modern organisational structure, well articulated in the modalities and times and with a high top-down component. It was increasingly evident that, in the absence of a similarly structured system of cross-functional and inter-departmental sharing, in the daily performance of work, one often found oneself in competition or even in opposition with the objectives of someone else and without the concrete criticalities that slowed down or hindered business being effectively addressed.*

*What has been important in experimenting with the HOLIO methodology in company development groups?*

*The direct and choral involvement of people from different business functions in identifying some critical issues that were slowing down the business or hindering its coherent development, and in elaborating proposals for solutions or improvements to some processes.*

*These groups led to the development of concrete projects in the company, which were then implemented by the employees themselves, i.e. those who, in the course of their daily work, were mainly confronted with the external part*

*of the organisation, i.e. the client. Particularly significant were the Movcore exercises (see evidence in section 4.3.1).*

## **6.4. Development in other organisations of the IMO International networks**

### *6.4.1. The case of the German bank Sparkasse (Adrian Bekman)*

#### **The situation**

The bank employs about 600 people and the (external) director reported various critical issues in their vertical structure. In 2008, he realised that he could not cope with the challenges of change required by the market such as: new technologies, change of generation, new policies to be implemented with clients and suppliers. The working style was very bureaucratic and slowed down client service a lot. For example, it took weeks to get a loan, which was no longer acceptable due to the speed of life. After an initial consultation meeting, in which the implications of the identified criticalities were reflected upon, it was decided to renew the organisational culture in a more client-oriented way and to introduce a new style of work. The idea was to change the old inspiring principle that each department takes care of itself and does not worry too much about others to a new principle: “we do things together, we cooperate constructively with the perspective of adding value to the client.”

#### **Questions and development infrastructure**

The director started, with our help, to implement the new culture with the community. He then involved his 2 colleagues from the board of directors to start defining it in practice by co-designing and co-creating new working strategies. He asked the next level of managers to do the same, and they defined the objectives with their colleagues, focusing on change issues from the client’s perspective. They defined a rhythm of systematic meetings at the board and manager level and identified developers (process owners) to explore the development questions that emerged.

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5 see footnote 4 and 5 ch.1

Some examples are given below:

- *How to move from selling a product to serving the client with respect to his specific needs?*
- *How to create and introduce the new Internet Sales System?*
- *How to initiate systematic cost reduction to improve margins?*

The team of developers worked exploring the questions with colleagues, experimenting with new possible processes.

### **The cyclical path and the exercise of horizontal leadership**

During the change period (which lasted about 10 years with 3-year cycles on various development questions) regular meetings of the three groups took place during which progress was monitored, the dialogue was held to share ideas for change and next steps. The point of observation was always client satisfaction, but also the achievement of the people working there. As a large number of people were involved, the timing and rhythm depended on the specific issues, which are not detailed here.

Every year the board of 3 directors met to reflect on the results achieved, also from a personal point of view and prepared the future steps to be taken.

The group of managers also established some strategic meetings during the year to reflect together on the experiences made, the aspects of implementation and the new questions which emerged and which needed to be transformed into new processes, and to define the next steps to be taken.

The developers worked with monitoring rhythms dependent on the various projects.

The following is an example of how a question developed in the process with the client's perspective: *How do you go from selling a product to serving the client with regard to his specific needs?*

Two different types of processes were created in the experimentation process, which was then brought up to speed:

- one for standard loans which were handled very fast following the principle: "first pay the client then finish the administrative and bureaucratic procedures";
- the most complicated cases were handled by seeking the best solution with the client.

To achieve this, different departments were invited to work together and the three-level mapping of the work process was very helpful, stimulating step-by-step improvement and collaboration.

In the monitoring meetings, work began without pointing the finger at the other person as being responsible for the ineffectiveness of the process, but the feedback was exercised to suggest to the person responsible for the process to be developed, how to change things from a cross-departmental point of view.

Many of the projects started in the past and get bogged down due to critical issues related to vertical vision have been channelled into some development processes, simplified, tested and then brought up to speed.

Specific self-management tools were provided to the working groups.

This made it possible to achieve results quickly on critical issues that had been present for years.

A special process initiated along the way was the one with 10 young new employees who were invited to propose throughout a year personal initiatives to improve processes they observed to be ineffective. This brought a very positive dynamic and proposals of great importance for the bank.

The two IMO consultants were considered as members of the working community and offered their thoughts, ideas and knowledge as they went along.

## **Results**

During the three cycles of about 3 years each, people acquired a common working method with horizontal leadership and created an integrated organisation in which top-down indications were processed in connection with process observations of the client and vice versa, visions of change were formulated in order to create a continuous synergy between the vertical and horizontal dimensions. Innovations were speeded up and motivation increased.

There has been a generative reorganisation of market offices and a systematic strengthening of leadership competencies at all levels.

The bank had a rating within the same network of banks in Germany which increased from “average” to “excellent”, from position 23 in the ranking to the top three. This means that on all parameters (profit, client satisfaction, efficiency, cost management, staff satisfaction) their score went from “good” to “very good”, which was the ambition of the Directors from the beginning.

The biggest change was with respect to the change of mentality of the people: from a functional and bureaucratic attitude of the past to one of interaction with the client to improve the service in connection with colleagues. For example, in the case of the loan process which used to take weeks to process, the change resulted in 80% of the loans being handled quickly with a standard procedure and only 20% being handled in a slower and more complicated way.

A young employee, participating in the development and connection meetings stated: "I now feel much more competent to generate a good process with my colleagues, to co-operate effectively, to move with ease throughout the company and, now that I have reached a new leadership position, I feel empowered to handle the critical issues I may encounter. The key is: do things together, with the client's perspective. This is what always works best".

#### *6.4.2 The case of St. Philomena Hospital in Brazil (Lafayette Parreira Duarte)<sup>6</sup>*

##### **The situation**

St. Philomena Hospital is located in a town in the state of São Paulo with 200,000 inhabitants. Founded in 1937, it currently has 100 beds. Its services include emergency, clinical and surgical, outpatient services, intensive care unit, maternity and a range of related services needed by its clients. It has approximately 300 employees and 150 doctors. It is a family-owned hospital and more than 90% of its revenues come from health insurance companies. The presentation of this case concerns the experience of its General Manager in implementing horizontal leadership as a means of dealing with critical issues over time. His relationship with the hospital started 20 years ago when his father (the main shareholder) invited him to take over the management.

After overcoming various moments of crisis in 2004, the hospital began a gradual process of growth, which led in 2008 to the directors becoming aware that they would no longer be able to manage the hospital as a whole well, with the culture and principles used up to that time. Until 2012, they managed to contain the critical points by assigning 6 people with sector-specific responsibilities, but even this was no longer sufficient to guarantee the healthy development of the hospital. It was clear that it was necessary

<sup>6</sup> See also the video testimony <https://www.youtube.com/watch?v=CDh4c98glzo>

to develop people and generate new types of responsibility to enable sustainable growth over time.

## Questions and development infrastructure

The management of the hospital from the beginning had been based on the vision of the working community as a fundamental entity and the centre of the “essence of the hospital”. It was now a question of going one step further, namely to develop the leadership of the people so that they could cope with the critical issues of development, which could no longer be governed by the team of directors alone.

There were two initial questions:

- *How to ensure that everyone in the organisation is motivated to do their job well?*
- *How can work processes be improved so that people are placed in the client's perspective?*

At that time one of the middle managers was attending the IMO master's course on horizontal leadership, the idea of horizontal leadership seemed useful to the context and so the management decided to start an organisational development path with the support of IMO consultants.

First of all, new inspiring principles were focused on and shared, the most important of which were the following:

- the people who are best placed to take the lead in changing processes are those who are active in them, not experts, not managers;
- the group of people who carry out the work must also be the ones who take final responsibility for the results.

It was decided that the board would promote the connection between people linked to specific processes through moments of dialogue in which they would map their work process on 3 levels<sup>7</sup>. For example, groups of nurses from the surgical ward, clinic, intensive care units, as well as groups from the laundry, canteen etc. were created. Each group would identify the critical areas of their process and together they would define the improvements to be tested. The board would support the work in regular meetings by facilitating their self-management.

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<sup>7</sup> see exercise 5 in ch. 4.1

## **The cyclical path and the exercise of horizontal leadership**

For the people, this style of working was a completely new path, which allowed them to express themselves, whereas before they were worried about the criticalities that were created and did not talk about the problems, fearing the managers' judgement. Reflective moments were foreseen in which people learned from the experience also how to cope with their own areas of personal development, generating new personal and organisational leadership competencies, towards horizontal leadership.

By mid-2014, many teams had been created in the hospital to work in this way and the managers saw their work lightened. To support the groups, the managers used specific self-management tools, which IMO consultants had already proposed in a horticultural company. Teams from both organisations met to exchange experiences and practices, which was extremely effective.

Awareness was created that the unit of reference in the hospital was the teams for specific patient services and not the individuals.

The groups met on weekly occasions and at a slower rhythm also with the board.

People in the groups who had taken initiatives for process development gradually felt more motivated and involved, and those who were reluctant to take initiatives started to get active. Everyone had the perception that they could make a difference and this created a strong commitment at all levels.

## **Results**

To date, there are 40 client-oriented process groups in the hospital that have been involved in more than 500 work process improvement initiatives. In 2017, 300 new hospital development initiatives were implemented.

## **Testimony of Director Lafayette Parreira Duarte**

*It is clear that horizontal leadership is a development practice appropriate to our times. It enables people as individuals to be visible and to become themselves. People put their own abilities into motion for the interest of others (clients, colleagues, the company). This gives meaning to their work and enables sustainable individual and organisational development. Through horizontal leadership, this hospital, which has existed for 80 years, is making great strides in the direction of its future.*

## **6.5. The international master's degree in horizontal leadership**

A particular declination of the HOLIO methodology was the creation of a master's degree in horizontal leadership, which envisaged a generative path of competencies based on the start-up of new processes in the organisation of the participants and, in the case of consultants and trainers, of new ways of working with their clients, according to the logic of systemic-evolutionary development. The master was launched in various countries of the IMO International network and in Italy, where 3 editions have been realised so far.

### **Who it is aimed at**

Managers, entrepreneurs, consultants and trainers interested in broadening their vision and skills to cope with the increasing complexity in the organisational world.

### **Questions**

The crisis we are experiencing urgently calls for a rethink of the meaning of work and organisations as places of collective creation. This raises serious questions about the role of leadership, which will increasingly have to be able to create working communities motivated by common economic objectives and the creation of social meaning a "horizontal" leadership.

Traditional leadership modes, in which rules and procedures, powers and delegations can be used, may guarantee the ordinary activities of the enterprise, but do not help in change processes. Whoever has responsibility roles or supports the organisation needs new approaches and inspirations to start sustainable development processes, which bring value to four key elements: clients, people, turnover, territory.

In this context, there is a need, more than for tools, for a new way of reading the organisational reality and of acquiring competencies to act not only to "solve the problem" but also to support the organisation so that it is able to build its specific ways of development. The master proposes a renewal of managerial, consultancy and training approaches in order to overcome the rationalistic and reductive vision of the organisation that separates processes and competencies, obscuring the purpose, the social sense of the organisation and therefore the work motivation.



It tries to answer the questions: *How to integrate the vertical functional structure with a horizontal, client-oriented dimension? How to responsibly activate people in organisations? How to create added value for clients, people, the economy and the region?*

## **Master's objectives**

Help participants to activate a leadership style that:

- guides not people, but processes in which people can activate themselves;
- focuses the sense of the organisation and the values that drive it, keeping them alive;
- formulates and explores the personal and organisational “question for development” and generates appropriate evolutionary processes from it;
- creates the conditions so that those who are responsible for and engaged with the “what” and the “how” and are in contact with the client, are constantly connected with this question, to whose evolution they can contribute;
- generates new competencies for moving in complexity: the competencies and meta-competencies of horizontal leadership.

In the master's course, the way of looking at the organisation and developing it according to the principles of the Horizontal Leadership Methodology for Integrated Organisations is proposed.

The key words identifying the working themes are:

- **DIALOGUE:** everything happens in interaction, which must be handled consciously.
- **PROCESS:** work does not take place in procedures, but in processes in which the common goal must be grasped.
- **BIOGRAPHY:** every change takes place in a story that one has to learn to recognise to plan a “concrete next step”.

## **The path: structure and duration**

The course lasts one year and offers a didactic structure designed to facilitate transformative learning.

The exercise methods mentioned in chapter 4 are proposed, inserted in a particular didactic structure which alternates theoretical input and practical part, allowing to explore the relationship between the development of individual competencies and the concrete processes of the organisations, renewing visions and working practices.

In the course, participants are activated as horizontal leaders in three working and learning modes that alternate according to a rhythm:

### **1-MODE**

**2-days WORKSHOP** aimed to:

- sharing of theoretical insights in relation to organisational and individual development;
- applying the theoretical input to one's organization reality working in sub-groups to define concrete steps to be implemented, reflect on their effects and criticalities.

### **2-MODE**

**EXPLORATION** in one's own working environment

The participants implement the steps defined during the workshops in their own context. Exploratory implementation enables the individual not only to "take action", but also to get in touch with his or her personal and behavioural limits.

### **3-MODE**

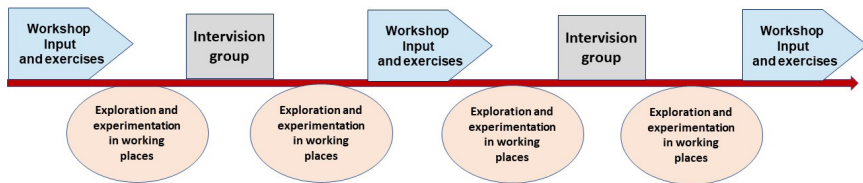
**INTERVISION GROUP**

One-day work in subgroups of 4-5 people with a twofold objective:

- to help participants identify critical issues and personal areas for improvement following the exploration in the work context and define new behavioural inspiring principles to be tested in concrete actions;
- to stimulate new ways of interaction between participants by exercising dialogue and listening skills necessary to support development.

The didactic scheme according to which the master's course is carried out is therefore as follows, which takes up the generative structure of the TRASE course.

### A generative structure for new processes and behaviours



In its implementation, the master's degree was divided into:

- 7 workshops, 2 days each, 2 months apart;
- 6 Intervision groups between one workshop and the next.

## Results

Consultants, trainers and managers, organisation managers who have implemented organisational development projects and acquired horizontal leadership skills, competencies and metacompetencies in their own contexts. (See some testimonials at <https://www.het-imo.net/it/master-in-leadershiporizzontale/>)

To date, the Master has been implemented effectively in mixed groups of participants, but it is planned to develop it within organisations of specific categories which, having a very sectoral training, need to acquire an organisational culture (judges, doctors, municipal secretaries, headmasters...).



# 7 - The HOLIO methodology for local development

*“Only by raising a creative diaphragm between the individual and the state, a new Concrete Community, is it possible to restore the lost harmony in the work of mankind and to give Europe a new order.”*

(Adriano Olivetti)

## Foreword

Just as in the systemic-evolutionary vision of organisation we have a second phase that creates processes that are increasingly self-centred and no connected with the rest (cf. par. 2.2.), so, with respect to the local communities of the past, we can observe a “second phase” of development of the territories in which organisations have multiplied. To face the problems induced by the new global economic system, they are increasingly centred on their own growth, thus losing sight of the synergies with the other actors operating in the same area and the impact on the quality of life of the local community.

Traditional communities have progressively crumbled and socio-economic processes have been “excarnated” from the territories into the “liquid” society described by Bauman.

What is needed is a rethink of local value, where the identity that is being lost must most often be reaffirmed not only on a cultural level but also and above all on a socio-economic level.

As early as 2005, the Lisbon European Council called on regional and local authorities, social partners and civil society to participate in development objectives by seeking to establish a governance model. To this end, local development agencies have been created and various programmes have been promoted, including LEADER and territorial pacts (PITs)<sup>1</sup>. This is to provide an alternative to the traditional concept of government, understood as a form of hierarchical and pyramidal top-down power, which is not suitable for development.

From the very first phase of the CNR project, various figures from the sector, heads of local development agencies and LAGs (Local Action Groups),

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<sup>1</sup> see Rizziato et al. (2022)

as well as Managers from Italian Commerce Institute (ICE), took part in the activities of the action-research group.

They were interested in experimenting with innovative approaches for the creation of development networks in the territories to facilitate exports.

In the reflections on the prevailing criticalities of the many implemented projects, three key elements emerged:

- the low continuity of the activities initiated in the projects, probably due to the fact that the time horizon of the activities was limited to the needs of project management, rather than to the real needs of local actors;
- the difficulty of putting into practice the objectives set during the planning phase, which is characterised by a high degree of complexity and often conditioned by bureaucratic rigmarole that has nothing to do with the reality of the socio-economic and cultural processes in the regions: little consideration has been given to the extent to which written projects, however sophisticated, are very different from projects which is possible to realize in practice;
- the lack of competencies and forms of local governance capable of fostering the right connections and a systematic dialogue in the territories, as well as of fostering strategic objectives for the local community by promoting networks of enterprises with permanent goals and projects. This was linked to the necessity to create new territorial leadership, responding to the need for networking and for creating local systems, integrating institutional and social levels.

The three points converged in the consideration that a systemic territorial leadership had to be created, which would allow a progressive evolution of territories, supporting those who deal with local development, with new competencies. The aim was to create real governance that could grow over time at the service of the local community. Therefore, a series of experimental projects were launched in various production districts and Objective 1 areas (Rizziato et al., 2007a, b; Rizziato, 2008b; Rizziato, Melone, 2008a, b). In particular, in Sicily, two projects have been launched and brilliantly concluded, each lasting two years: one in the Madonie district in Palermo province and a second one including, in addition to the Madonie's, 3 other territories<sup>2</sup> (Rizziato et al. 2022) as further development.

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<sup>2</sup> For any further information, please see also the video documentation of a cooperation project <https://www.het-imo.net/it/sviluppo-locale/>

Here we do not want to go into an analysis of the theories and criticalities on local development, which have already been carried out and described in the action-research activities (Rizziato et al., 2007, Rizziato et al. 2022), but to summarise how effective experimentations have been started with the HOLIO methodology, declining it for the development of territories, in order to try to overcome the three problems highlighted above.

First of all, a systemic-evolutionary vision of the territory has been developed, as already done for people and organisations, considering it as a prerequisite and “map” to start systemic and sustainable paths in time, leading to the integration of local economic, social and cultural elements, keeping a global view.

### **7.1. The systemic-evolutionary vision of the territory and the integration phase**

*“To those who object that so far in history it has not been possible to bring about structural changes using non-violent methods, that there have been no non-violent revolutions, we must respond with new experiments, so that it is clear that what has not yet existed completely can exist.*

*A new history must be promoted”.*

(Danilo Dolci)

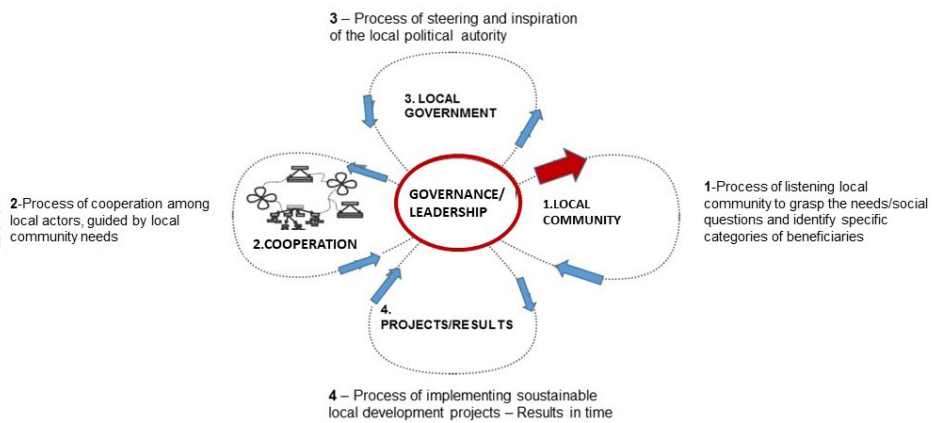
It is important to bear in mind that when working at the level of local development, one encounters organisations at different stages of evolution and therefore with different development needs: one must therefore find the red threads that link these needs to each other and the growth of the local community, considering the global horizon, according to the well-known motto “Think globally, act local” which has long accompanied the paths of sustainability. This may lead to the evolution of a third phase of the territory, an evolved phase of “integration” of development needs at various levels.

The image of the integrated territory, which we have called the *four-leaf clover of local development*, considers the ordering element of the complexity as the added value that must be brought to the local community in the various projects and who has the leadership/governance of the territory (the development infrastructure) as the element of synthesis of the complexity itself, in the system actions that will be undertaken, similar to the image of the integrated organisation.

Following a path similar to TRASE, those who have the

governance/leadership will be able to connect the institutional levels with the socio-economic levels, i.e. the more structured, vertical elements with the more dynamic, relational, horizontal ones, opening up new visions and practices for participatory planning of local development.

In the experiments carried out, it was found that thanks to the development of a new awareness and systemic-evolutionary skills, competencies and metacompetencies characterising horizontal leadership, it was possible to start generating a “third phase” of the territory, an “adult” phase in which it was possible to have a growing awareness of the whole and the parts, the phase of integration of the territory.



*Fig. 7.1 - The integration phase in the territory and the cloverleaf of local development*

The various applications of the HOLIO methodology to local development have demonstrated Putnam’s (1993) theorisation of the concept of social capital, which highlights not only the compatibility but also the effectiveness of combining individual interest with the search for the common good, by promoting trust relationships, shared values and social networks, which create the true value of a community. This is an intangible value, which is found “in” social relations and is realised in processes that produce tangible effects on a socio-economic level. It is thus possible to create what we call “modern communities”, places where people, organisations and territories can develop.



Adriano Olivetti had already worked in this direction with his political project of local communities, which found their connection not “in constraints or conformism, but through the slow formation of a personalist and communitarian conscience”<sup>3</sup>. For him, “only in communities will intelligence be truly at the service of the heart, and the heart will finally be able to serve intelligence”.

Olivetti saw the issue of work as central to community centres, not only as a question of the economy and the market but as a political problem of institutions. The “Concrete Community” he theorised had as its theoretical and conceptual references socialist thought, the Christian ideal and the personalism of Mounier, reformulated on the basis of local reality and historical contingencies. For Olivetti, political action had to represent an effort to create institutions that would make it possible for people to harmonise and synthesise different needs and vocations, expressing even then a globalised vision made up of interconnections.

Among his thoughts on the sense of local communities expressed in his *Manifesto Programmatico del Movimento Comunità* is a view that we can now consider pioneering, considering that it was written in 1953:

“Today, we believe it is finally becoming clear that Western progress is linked to a unified vision of the world: the fate of the Persian, Chinese or Indian peasant is linked to the fate of the European and American urban worker. This is for reasons of common welfare and justice, economic stability and international order”.

Geno Pampaloni<sup>4</sup> commented on this:

“One of the fundamental characteristics of Adriano Olivetti’s figure, personality and role was a sort of pendulum movement between the small community of Canavese and the universal society project to be built”.

We can observe that globalisation has certainly not developed according to this logic, but we believe that we can start again from the territories to trigger virtuous mechanisms that can influence global logic. The HOLIO method, in its peculiarity of being able to weave connections between personal, organisational and local development, working on what Adriano Olivetti called “personal and community awareness”, can offer significant support, also in the perspective of the UN 2030 Agenda, which outlines the

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<sup>3</sup> For more details see Rizziato, Melone (2008b).

<sup>4</sup> He worked with Adriano Olivetti as head of cultural services and general secretary of the *Comunità* movement.

criteria for future growth and recalls the need to interconnect the various critical issues we are experiencing in a perspective of economic, social and environmental sustainability. On the political side, it would be useful to take up some of the elements of the community experience that can provide inspiration for the creation of new forms of local communities to tackle the critical issues of unbridled globalisation, the consequences of which we are suffering at various levels.

In the following, the elements of the local development cloverleaf for territorial integration will be described (par. 7.2.), the particularities of the application of the HOLIO methodology to local development (par. 7.3.) and finally a case of practical application in the Sicilian territory will be reported (par. 7.4.).

## **7.2. Local governance/leadership as a development infrastructure and the 4 key processes**

At the heart of the local development cloverleaf, a “development infrastructure” is created, consisting of two communities: one of the project leaders and one of the operational figures (developers). The latter may emerge following a number of project presentation workshops to which local actors will be invited. In general, the question of who are the persons composing the two communities, which will have to guarantee the governance, depends very much on the territorial reality and is still an open issue. Typically, it should be people from local development agencies, including LAGs, but the experiments carried out showed that, to give continuity to the processes started, it would be appropriate to have people from the municipal (level 1) and/or regional (level 2) institutional levels, so as to create on the territory the competencies of local development experts, such as horizontal leaders, who can create and support systemic development initiatives over time.

The people who make up the two communities at the centre of the cloverleaf will be the link between the inputs of the local government, the demands of the local community and organisations, to ensure the desired results. They will act as horizontal leaders. The first step will be to identify local needs, the relative beneficiaries of the desired change and the organisations that are affected by that change (process 1); then, to identify the “red threads” that link the development question of individual organisations to a common territorial development process (process 2); and, at the same time, to trace the links with the principles and norms that

inspire local policy on the part of those who govern it (process 3). From this threefold interaction, the development questions of the territory will be defined, from which sustainable development processes can emerge, leading to concrete results (process 4).

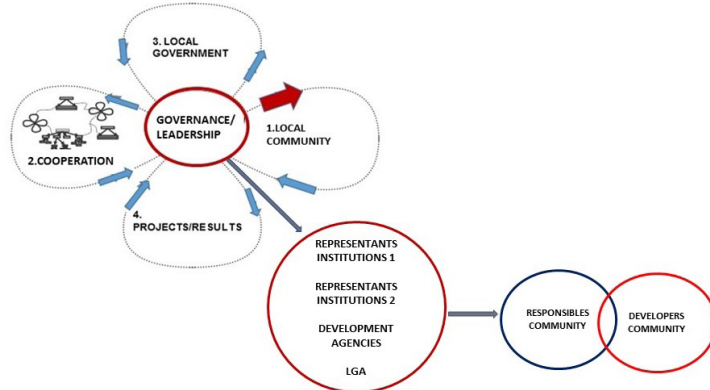


Fig. 7.2 - Local governance/leadership

The image of the four-leaf clover makes it possible to visualise the flow of one process into another, as an organic and systemic reality, linking the various dimensions of the territory.

Let us look in more detail at the processes represented in the image of the four-leaf clover for local development.

### 1. Process of listening to the needs/questions of the local community and identification of beneficiaries

The needs of a community can manifest themselves in a variety of ways: the continuous relocation of immigrant communities in a territory, the decision to relocate a leading company in a district, the need to create new jobs, the need for better health services, etc. are factors that bring with them development questions to find a dynamic balance.

Beyond easy generalisations that see the objective of change as the need to improve local living conditions, it is important to focus on a specific beneficiary, or group of beneficiaries, that will give shape to an equally specific development process, whose systemic connections should be observed. The redevelopment of the school system in an area will benefit first and foremost the pupils and families, but it will have an indirect impact on the cultural level of the whole territory. It seems an obvious consideration,

but it is very important to focus on the beneficiary, because the process will have to be oriented towards the satisfaction of its requests, in an “osmotic” way with the context.

It will be the beneficiary who will show how to improve the processes related to the products and/or services he/she requires if activated by those who have the leadership/governance of the development. It should be remembered that as for the organisation the ultimate sense is to produce/offer a product/service for someone, the same is also true for the territorial organisational system as a whole, which should consider the well-being of the local community in all its aspects. It will be necessary to recognise the presence of several questions for the development of the territory, as well as the importance of defining their substance in relation to the beneficiaries. It will therefore be essential for those at the centre of the cloverleaf to hold interactive meetings to listen to the local community on the critical issues to be addressed, with the active involvement of key players.

People working in a local development project will act to identify the question adapted to that specific local reality, taking responsibility as horizontal leaders for the resulting development process.

## 2. Collaboration process driven by beneficiaries' needs

To be the leader of a development question does not only mean to identify who poses it (the future beneficiaries), but also to identify all those actors (organisations) of the territory potentially involved in the path which, starting from that question, should generate an innovative process or a process innovation. We can define them as stakeholders because they are involved in various ways in the process. It is very important to help each local actor to identify first of all the development needs of its own organisation, with respect to its specific client, and then to look at the wider development needs of the territory.

The role of local leadership/governance is to grasp the red threads of development questions that arise with this approach. From these red threads, the real question of the territory must derive, where each subject will be able to grasp the socio-economic repercussions for the development of its own organisation with respect to the processes of territorial development. For instance, the need of some accommodation facilities of a territory to become potential components of a tourist pole requires the provision of on-site professionalism, able to promote the whole local offer (ranging from typical products to cultural and religious visits etc.). This need can be linked to the need to upgrade tourist-hotel establishments, but also to the municipality's

need to create new jobs for young people, or to the question of some cultural associations to promote their services. It is the responsibility of who has the leadership/governance of the development to grasp these connections and to generate sustainable, synergistically enriching processes.

### 3. Process of guiding and inspiring those who govern the territory

In accompanying the various actors in envisaging possible development processes, horizontal leaders must take into account the values and principles that guide the strategic lines defined by the institutions governing the territory itself and, in a broader sense, those dictated by national and international institutions.

Decentralisation policies and spatial planning and consultation tools highlight the need expressed by national and supranational government institutions, such as the European Union, to adapt policies imposed from above to the needs of local realities. For some time, the importance of declining general strategic lines, according to the particular characteristics of local contexts, has been recognised to favour the sustainability of development processes at the environmental, economic and social level.

It will be the task of those in charge of territorial leadership/governance, in interaction with those who govern them, to transmit the guidelines of the broader national strategies to the territory and, through interaction with local actors, to make them a reality. In order to do this, the systemic evolutionary perspective of people, organisations and the territory proposed by the HOLIO methodology is a highly effective reference point.

### 4. Local transformation process and generation of results

From the identification of the question of the territory, local development processes will be hypothesised, which will have to pass an experimental phase, to verify the feasibility in terms of resources and concrete involvement of local actors, before being brought into operation.

From the perspective of sustainability, it is essential to assess the actual effects of a change, which must first take place on a small scale, and to verify and possibly re-orientate it with the involvement of stakeholders. Even after an initial agreement with local stakeholders, it is not possible to plan big-scale projects, but it is necessary to propose concrete steps on a small scale and then verify the real possibilities, availability and interests.

Local development is a participatory process and the leadership of the area has the task to guide the transition from question to process, with the

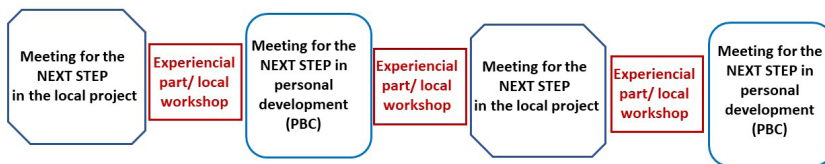
related re-orientations linked to the exploratory-experimental approach, and finally to the proposal of completed and shared development projects in terms of desired results and necessary resources. The generative aspect of local transformation projects will favour the creation of development communities.

### 7.3. The Systemic Evolutionary Training Cyclical Path (TRASE) in Local Development

Depending on the type of project envisaged, the two communities and development infrastructure will then be created, defining the timing and rhythm of the meetings, as described for organisations in section 3.1.

To set the local development process in motion according to the proposed four-leaf clover image, a similar TRASE cyclical path will be followed as described for the organisation (see section 3.2.), but with a higher level of complexity.

The local development consultant will promote specific meetings and connections with the two communities to share the development vision of the territory, the assumptions of the exploratory and experimental approach, exercising horizontal leadership, and will help to focus on steps to be taken, both with regard to processes and competencies of the group.



*Fig. 7.3 - The generative structure of the TRASE cycle path in the territory*

In the case of local development, the generative structure of the TRASE cycle path in the experiential part will concern not only the realisation of the steps established in the specific context to be developed but also the realisation of workshops with the key actors of the territory. These workshops will accompany the cycle path and give the possibility to generate shared processes with the local community, both for the exploration part of the development question and for the collection of new ideas and the experimentation of sustainable and systemic local development processes.

The style of conducting the workshops is very important: arbitrary discussion should be avoided, focusing instead on deepening the question through concrete examples and orientation towards the client/end beneficiary<sup>5</sup>.

As for organisational development, also for local development, the first step will be facilitated by experts supporting both managers and developers (the development infrastructure of the specific project), who will then be able to generate further changes themselves.

This will be possible thanks to their acquisition of horizontal leadership competencies, which will represent a real “social capital” in the territory. At the end of the first development cycle, a core of governance in the territory will have been generated.

As in the case of organisations, the local development process is divided into two macro-phases, which transversally envisage learning and the generation of processes and competencies. A special feature of the exploratory phase for local development will be the dynamic reading of the territory, which must be carried out on three levels.

A territory is an expression of a geographical reality and a human reality, which together have determined social, economic and cultural realities. It is, therefore, necessary not to limit oneself to data collection, but to explore the following levels:

1. physical level (geographical and master data, statistics);
2. level of socio-economic relations (companies, the world of work, association, schools, trade unions, various social dynamics);
3. cultural level (history, traditions, social culture and identity of the territory).

The methodologies typical of different scientific approaches will be used to read these levels:

1. physical/natural sciences, empirical and phenomenological method;
2. social sciences, biographical, longitudinal and interactive method;
3. cultural and/or spiritual sciences, narrative/ethnographic and symptomatic method (Rizziato et al., 2007).

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<sup>5</sup> To generate these skills, specific exercises will be worked on, some of which can be found in chapter 4

The following is a case study of the application of the HOLIO methodology for a local development project in Sicily, the results of which were fed into a subsequent co-operation project in a larger territory including 4 local areas (see footnote 1).

The principles of the HOLIO methodology have also been effectively applied in various placement projects as a form of local development (Rizziato, Melone, 2010; Rizziato, Nemmo, 2013; Rizzato et al., 2014; Rizzato et al., 2022).

#### **7.4. Application case**

### **A PIT project (Integrated Territorial Project) and further development**

#### *The situation*

In the context of the CNR's action-research activities, the president of the Madonie development agency So.Svi.Ma. (Alessandro Ficile) expressed his interest in enhancing the existing resources in the Madonie regional park and the 21 municipalities included, starting with a survey of the state of the art of local businesses, tourism, cultural and environmental heritage, agri-foodstuffs and typical quality products. He pointed out that much had been done in the area, but that work was being done on the "what", i.e. at the level of tools, and not much on the "how", i.e. at the level of methodologies, which would allow the tools to be applied and exploited, so as to generate, at the same time, the competencies to manage them by launching participatory and lasting processes in the territory. Therefore, planning with the principles of the HOLIO methodology was started within a PIT (Integrated Territorial Project-European Social Fund) call, to be implemented in the Madonie area in Sicily between 2006 and 2007.

#### *The question and project design*

The question on which the project work with the President of So.Svi.Ma was based was defined as follows: How can the needs of local actors be fostered and how can they be helped to identify precise responsibilities to create shared development processes, thus creating a "social capital" and generating continuity of the initiatives launched?



It was proposed to set up the project according to a systemic-evolutionary vision of the territory, people and organisations by experimenting with a governance mode as a development infrastructure with horizontal leadership: the infrastructure was initially composed of the people of So.Svi.Ma and some institutional representatives of the municipalities of the area; later it was enlarged to a group of developers emerged from the first meetings, who then became horizontal leaders of development processes of the Madonita area.

Starting from the initially expressed question, the following project aims were defined:

- promote innovative and sustainable processes, generated by sharing with the local community, while training specialised and expert figures in local development to support the policies of the Madonie development agency (So.Svi.Ma);
- work with new, systemic competencies, putting people at the centre, as proposed by the methodology for horizontal leadership and integrated organisations, to evolve both the local culture and the processes that can support it at the socio-economic level by networking local potential to create “social capital”.

The project consisted of three main actions:

- monthly workshops for interaction with the territory,
- cyclical pathway to first-level training for professionals, councillors, entrepreneurs, developers
- cyclical pathway for a second-level training for young unemployed people to be included in the development processes initiated in the first level.

After the first workshops with the participation of various local actors (mayors, entrepreneurs, cultural associations, teachers, professionals...) various development questions emerged. Here are some examples:

- *How can we interact with the superintendency to speed up and improve the quality of responses?*

- *How to identify tourist-clients by type and organise co-ordinated services in the area based on these clients?*
- *How can the identity of the area be developed while maintaining its special features?*
- *How to revitalise and improve the liveability of historic centres?*
- *How can we make the most of the skills available in the area?*
- *How can agricultural producers be involved in a single production to reach commercial networks in a unified way?*

Interestingly, the feedback mentioned the enormous value of working in mixed groups on a professional level and the importance of working on the question to break out of the conventional way of dealing with local problems.

It was then decided to identify the persons who, due to their particular characteristics (drive for innovation, pro-active attitude, openness to the territorial social network, etc.) and availability, could take responsibility for the questions, identifying the group of developers. This step was done in agreement with the president of the local development agency.

Starting with the identified questions, still to be explored and reoriented, and the subsequent identification of the developers who took responsibility for them, the cyclical TRASE path and the exercise of horizontal leadership skills and competencies began.

Representatives of So.Svi.Ma and local authorities mandated of the project also took part in the process. In this project, the two communities of responsible and developers almost always worked together. In fact, it was necessary to share step by step the emergence of a new style of work which was going to change the way of connections between the mandated part and the operational part. The process was carried out according to the outline written in chapter 3.2.

The group of unemployed young people followed and accompanied the work and processes initiated through the TRASE process and supported the groups with specific initiatives.

In the course of the project, the questions were reformulated in an attempt to identify some red threads among the organisations representing possible virtuous connections. Therefore, two macro-questions for development were defined:

1. *How can tourism in the Madonie be developed with regard to the modern requirements of the eco-tourist?*

2. *How can the agri-food sector be developed, enhancing the value of the local identity and promoting domestic consumption?*

From the two macro-questions, more specific sub-questions were defined, in order to arrive, following the rhythm of the cyclic pathway in which the workshops were inserted, at their maturation and sharing with the local community. New processes were then defined to be experimented with the 7 beacons dynamic designing.

The details of the process development are not reported here but have already been documented (Rizziato, Melone, 2008a). It is only intended to give an idea of how it was possible to move from what to do to how to do it: it was essential to work on the personal development of responsables and developers with respect to the critical issues arising in the work, stimulating both group and individual learning.

Dynamic planning made it possible to set up the work in a flexible way, encouraging a generative dimension with the local community, which led to the definition of completed and shared projects at the end of the path.

After the steps taken according to the cyclic approach and the suggestions and exchanges received during the monthly workshops which accompanied the whole process, the processes were reoriented until they became intertwined in various aspects, leading the groups active in the two questions and processes to work together.

The tourist process group concluded the experiments by developing daily tourist packages that included accommodation facilities selected according to certain quality criteria, cultural routes linked to the identity of the territory, including gastronomy, managing transport in a coordinated way with the planned activities and the involved bodies (pro loco, Madonie park authority, some municipalities...), trying to exploit the tourist influx from Cefalù to promote the Madonie hinterland.

On the other hand, the agri-food process has concluded its experiments with the inclusion of Madonie products in school canteens, with agreements between producers and commercial distribution, and with hoteliers for the inclusion of local menus and the promotion of taste itineraries.

## *Results*

Both processes continued after the end of the PIT project thanks to the skills and social capital created by the project.

The people in the working group set up an association for the promotion of the area and launched various related project activities, having learned fundamentally the need to be active in the first person, to know how to work in a learning group and to listen to the territory.

In particular, the school canteen process had focused on the following as part of the desired outcomes:

- including typical Madonie food and agricultural products in school canteens, replacing industrial products;
- enhancing the value of the typical and agri-food products of the Madonie by promoting their knowledge and dissemination;
- promoting the short producer/consumer chain;
- changing the consumption patterns of children and families and educating them about proper and healthy nutrition;
- re-territorialising a process of economic development that restores new social and economic cohesion between production and consumption areas.

The subjects involved were:

- Municipalities (Alimena, Blufi, Bompietro, Campofelice di Roccella, Castel buono, Castellana Sicula, Collesano, Gangi, Geraci Siculo, Lascari, Petralia Soprana, Petralia Sottana, Resuttano, Valledolmo).
- Provincial Health Authorities.
- Assessorato Regionale Risorse Agricole ed Alimentari (SOAT peripheral offices).
- Schools (pre-school and primary).
- Private companies participating in the initiative (50 units).
- Pupils directly involved (3,900).
- Families involved in the process (2,150).
- The number of daily meals covered by the project was 3,500.

The results were pursued with positive spin-offs for the connections between producers, distributors and packaging companies that have formed special consortia for quality and quantity assurance.

The improved internal production also had an impact on other potential beneficiaries, such as restaurants, B&Bs in a virtuous synergistic process that has long continued over time and is still ongoing. The development agency So.Svi.Ma is extending the supply of local products to other collective canteens. The processes were further developed in a cooperation project with 3 other territories, as described in the testimonies.

## Testimonies

### Alessandro Ficiile (President of So.Svi.Ma)

The PIT project, to which the horizontal leadership methodology was applied, enabled the Madonie territory to considerably develop and expand its Territorial Social Capital. The applied methodology has facilitated the diffusion of an institutional learning process, a comparative and competitive approach and the spread over the entire territory (administratively defined by the adhesion of 22 municipalities and the Madonie Park Authority) of a strategic vision and a common glossary, all useful elements for participatory governance. As a further concrete demonstration of the excellent work carried out, the project was proposed and accepted as good practice by the Ministry of Labour and Social Security in the framework of the “National Catalogue of Good Practices of the European Social Fund and the Programmes and Community Initiatives implemented in Italy 2000-2006”.

The project also made it possible to:

- implement important innovations in the functioning of individual administrations;
- make significant progress in the allocation of associated functions on both the public and private sides;
- implement new and better ways in the capacity to plan, monitor, supervise and evaluate processes and projects;
- revisiting and/or reorienting current development processes and building new ones, such as the one concerning the use in school canteens of food coming exclusively from the Madonie area;
- produce widespread development of public management culture.

Thanks to what has been developed in the two years of intense activity, we have been able - as the local development agency for the Madonie area - to lay the foundations for starting the “construction” of a new polycentric and widespread city-territory: the network city Madonie-Termini, capable of:

- guaranteeing collective service standards for the population and urban businesses;
- attracting new companies and new qualified human resources and thus putting a brake on emigration;
- improving access to existing services and activating new ones in an enlarged territorial context;
- promoting a new system of “internal” and “external” mobility.

A “new” Sicilian city, the fifth-largest in terms of population and the largest in terms of surface area (more than 2,350 square kilometres), a “new” city that wants to develop in perfect homogeneity with the territorial area that has carried out experiences of negotiated programming, integrated design and strategic planning and in full functional continuity with the territorial governance and the lines of development pursued in almost 15 years periods.

In particular, the school canteen process has had the effect of activating positive collective externalities, such as:

- accessibility of quality food for all
- reducing transport and the resulting pollutant emissions
- less use of pesticides for storage and transport
- increasing the capacity of the environment to replenish its reserves
- stimulating sustainable local development (combining economic, social and cultural components).

In order to respond to the needs of the beneficiary “school canteens”, a process of connection between producers and distributors has been initiated, leading to the construction of a new supply chain that has made it possible:

- the spatial, cultural and social rapprochement between producers and consumers;

- a system of innovation that sees the search for more sustainable food systems as its goal;
- another way of thinking about and experiencing production and consumption.

The initiative has enabled dozens of farms to recover new market spaces for their quality products and at the same time to increase the endowment of public goods (erosion and water flow control, protection of biodiversity, maintenance of the rural landscape, etc.) in the logic of ecosystem services.

Thanks to the project it has been possible to hinge the new food planning process in the Madonie area (i.e. the set of tools - in the form of plans, regulations, incentives, communication or education campaigns - which, in the context of economic, social and environmental activities, direct and harmonise the production, processing, distribution, purchase, consumption and disposal of food, taking care of the relationships between the agri-food systems and the community) that the Madonie Internal Area is carrying out as a prototype area for the experimentation of the SNAI (National Strategy for the Internal Area).

The results were pursued with positive spin-offs for the connections between producers, distributors and packaging companies that have formed special consortia for quality and quantity assurance.

The improved internal production also had an impact on other potential beneficiaries, such as restaurants, B&Bs in a virtuous synergistic process that has long continued over time and is still ongoing. The development agency So.Svi.Ma is extending the supply of local products to other collective canteens.

To further continue and develop the processes initiated with the PIT project, in 2014 we embarked on a cooperation project involving other Sicilian territories and their respective four local development agencies (GALs). Each GAL proposed different project themes but chose to implement them using the same methodological approach, that of the methodology for horizontal leadership for integrated organizations and territories, working together in a “cross-action” to share a common approach. The aim was to move beyond traditional project logic and create processes among territorial areas with common generative development logic, following the positive experience of the Madonie PIT project. This would allow for the transfer of the results of specific innovations achieved in the actions of individual projects between different territories, ensuring their development and continuity.

The involved territorial areas were: the Bagheria area (a rural zone east of Palermo), the Madonie area (an inland zone of the province of Palermo), the Iblei area (a mountainous zone of the province of Syracuse), and the Sicani area (a rural zone between the provinces of Palermo and Agrigento). The cross-action was supported by experts from CNR-IRCrES and IMO International Foundation, with logistical and organizational assistance from GAL Sicani, planning to extend the experiments started in individual projects to all 4 involved areas.

The cooperation project partners with the CNR-IRCrES and IMO group identified three specific themes that each involved area would begin to experiment with:

- improving the quality and attractiveness of some local tourism experiences (Bagheria area);
- supporting the production of typical products and the Mediterranean diet by promoting forms of ethical and responsible consumption (Madonie area);
- initiating a process of industrializing the waste from the citrus and livestock supply chains (Iblei area).

The project was successful, as can be seen from the video and the publication that describes it (cf. footnote 2).

Specifically, the activity initiated in the Madonie was articulated in 3 actions:

- Action 1 – Spread and enhance the perception of the Mediterranean Diet as a healthy diet capable of strengthening the rural identity of the territories.
- Action 2 – Create and strengthen small logistical platforms.
- Action 3 – Build new domestic markets for traditional foods linked to the Mediterranean Diet.

The project, thanks to the growing international value recognized for the Mediterranean Diet, initiated the construction of new and better market spaces for quality agricultural and agri-food productions, both domestically (regionally) and extra regionally and internationally.



This was achieved through the promotion and valorisation of the Mediterranean Diet as a healthy eating style and as an identity and cultural factor for the involved populations, thereby inducing the consumption of typical products available from local producers, both for local communities through the modification of the dietary tables at the foundation of school canteens and for the restaurant and hotel sector by significantly typifying the gastronomic offer and orienting it more towards the territory of origin.

Thanks to the involvement of the four Sicilian GALs that promoted the project and the rich and qualified partnership mobilized, it was possible to structure the organization of the offer on the different territories, transferring the model of promotion and valorisation of the Mediterranean Diet (Typification, Nutritional re-education, Local market and short supply chain, Large distribution).

The objectives that the project set and achieved are entirely consistent with regional strategies, as they have concretely initiated a clear recovery of the competitiveness of companies. This recovery was determined not only by acting on the internal factors of the companies but also on external ones, thereby recovering and reaffirming the social role and dimension of the agri-food enterprise.

All this is in line with the macro trends that are increasingly asserting themselves at the community level, in the growing conviction that “the social value of agri-food production” assumes a strategic character about the organizational choices of companies and their relevance in the so-called context variables, and therefore in the growing awareness of the need to recover the community and social dimension of the territory, local knowledge, non-market interdependencies among social actors, economic actors, and public institutions involved in the cooperation process, as a foundational element on which to build a model of socio-economic development aimed at strengthening the identity of the territory, creating new activities, improving competitiveness, and accessing markets.

The project gave particular importance to the role of school catering, already a subject of innovations in the PIT project. The catering process has matured with the acquisition of a more widespread awareness of its central role, especially in terms of education and the promotion of healthy and balanced nutritional styles. This awareness among all the actors directly involved in the process (students, teachers, and families) was followed by the need to seek a new balance between purely economic logic and health principles.

Starting from the four cornerstone objectives on which the project has unfolded, namely goals of economic, environmental, social, and health nature, we have demonstrated how and why these four objectives, so far seemingly conflicting, can and must instead become synergistic and harmonious. And how it is possible to build a new model of multi-level governance, that is, a new capacity for government and management of multisectoral policies that involve and call to the field both public and private entities operating on different levels and dimensions (local, provincial, and regional).

The project activities, with the support of the cross-cutting action of CNR-IRCrES and IMO, have allowed us to graft onto the work and experiments that, for some years, the Agency for the Development of the Madonie, So.Svi.Ma. has carried forward in its territory, a process of further maturation of what has already been developed and thus transferred to the territories of the four Sicilian GALs participating in the Cooperation project the necessary methodological approach as well as content-related.

#### **Giuseppe Ficaglia (agri-food process developer)**

I was invited to participate in the project by the President of So.Svi.Ma and I accepted because I was immediately struck by the lines on which it was centred, which then led to results that fully satisfied me. The aspect that most interested me in this project, apart from all the experiments in the processes involved, is anthropological, the focus on human and social capital as a fundamental element. From many small pieces of social capital, I believe that a real capital of harmony has been created, which can represent the added value of any local development initiative that will be implemented in this area over the years. The local productive fabric has always been limited by its scarce capacity and attitude to network, except in special cases.

The fact that young people in various capacities were involved in its development, sharing moments of confrontation, even heated at times, was of particular importance.

In the project, I was involved in the work of the agri-food development process with my companions, with whom a particularly close-knit group was formed due to the fact that they have in common both love for food and wine in general and love for this area. We worked hard towards a single goal: that of increasing the agri-food chain in the territory.

During the project, I acquired the ability to listen to the local needs, even the most hidden ones that are not immediately made known, and the ability to manage the process, in particular the relational aspects and the ability to manage time.

The exploratory phase was important to get to know the first elements of the question for the development and to receive feedback on the activated actions to start further explorations according to the verifications made. The workshops were an interesting tool because they gave the possibility to those who had attended the first level training not to lose contact with the territory. In the beginning, the impression was one of bewilderment because the proposed methodology upset the approach to which we were accustomed. For example, the willingness to listen to the area, because before we started from our own vision, which even if it was the result of previous comparisons was still our own. There was often a tendency, even in good faith, to impose one's vision on others, disregarding the sensitivities and inabilities of others to follow you along that path.

There is no doubt that the processes initiated constitute a heritage that the project has left for the future, thanks to the element of harmony that it has helped to create, a "social capital", making those who have participated aware of their potential and how much this potential can only be enriched if we succeed in creating a system. This, I believe, will be the most important element in any action to be taken in future years. Besides, I believe that, by now, lines of development have been drawn in the agri-food, tourism and artisanal businesses that will continue, increasing awareness of the importance of teamwork. In this sense, the project represents a point of no return for the growth of this area.

We learned that two elements are important for team building: the first is the ability to question oneself, the second is the importance of listening to the other party.

*“In our search for a meaningful methodology that can cope with complex development situations in organisations and interpersonal relationships, we first encounter three key concepts that deserve our attention if we really want to change. They are: process, dialogue and biography”.*

(Adriaan Bekman)

It is in the double connection between personal and organisational identity development that the concept of co-creation and creativity takes on deep meaning. It is important to give people the opportunity to do this. One can thus speak of a humanism of organisational life, insofar as one recognises the importance of work with respect to the meaning and creation of social identity, which is a fundamental part of the overall personal individuality.

Organisational systems created by human beings need meaning and morality. In natural systems we can observe an implicit morality, a “sense in itself”. In the organisational systems we create, we have to generate this morality together: suppliers, clients, colleagues, managers, directors, entrepreneurs, we are all involved in interactions at the same time which we need to make sense of in an evolutionary way.

# Conclusions

## Summary reflections and future prospects: necessary humanism and possible humanism in organisations

*“Businesses derive their legitimacy not from the ability to commodify the world and people, but from the ability to create objects and activities that are genuinely useful to people’s lives, to the “testimony of the meaning” of human civilisation. It is in feeling part of reality, in seeing the vital usefulness of one’s task, that man recognises the meaning of his work and is motivated to carry it out. This is the irrepressible human dimension, in the changing forms and contexts of the experience of work. As long as people sustain their existence through work, humanising the world”.*  
(Francesco Novara)

The book described a methodology for a “possible” humanism in organisational life. It consists of activating individuals to be creative at work, while pursuing organisational and personal development in a logic of sustainability. This is a path that is increasingly necessary today, to cope with the many critical issues in the workplace, especially the recent technological challenges, which call for an “augmented reality” of human intelligence to go hand in hand with the increased reality of artificial intelligence. The former is characterised by creativity and freedom to generate new possibilities, beyond the schemes and connections of the “already thought” and its possible combinations, within which the machine moves and allows forms of development, as an evolutionary opportunity for all stakeholders. This is possible because human intelligence has the potential of reflection, in which it is possible to learn and attribute meaning to things and, consequently, imagine new scenarios and ideas to achieve them.

Many experiments have shown that human beings find their health, motivation and fulfilment at work in tending towards a dimension that transcends ordinary work, in participating in the creation of renewal.

In order to cope with the radical changes we are called upon to make in the various sectors of society, it is increasingly important to create spaces for the expression of individuality, which is quite different from boosting

the ego, as happens in certain dysfunctional and pathological organisations, which are the expression of rational cultures that reduce complexity.

The health of an organisation consists in the continuous tension towards the development of the quality of the products/services it offers to society and in the possibility for people to perceive its usefulness, its social purpose, actively contributing to the improvement of the processes that determine it. This being active and responsible allows the perception of oneself as a social actor and is a constitutive element of one's identity: it is in the possibility of being able to take initiatives and decisions that one's personality evolves.

In this sense it becomes an ethical issue to create spaces where people can be active in transforming their work.

The concept of development proposed by the HOLIO methodology is systemic, made up of connections, not only in the technical sense, but connections that allow the attribution of meaning to the evolutionary path of one's personal identity, the organisational identity and, as we have seen, also the territorial identity. These three levels of identity intertwine various levels of economic, social and personal values and meanings, making it possible to revitalise work. It is the attempt to make "organic" what is peculiar to the "system created by human beings", the organisation, which compared to natural systems is characterised by the presence of free consciousnesses and by a cultural and value dimension that it is up to us to represent healthily.

The challenge today is to bring this vision to life by enhancing its creative potential, avoiding falling into reductive conceptions and rationalistic modes of control, which make people commodities, "resources", as they are usually called.

The HOLIO methodology proposed a concrete way to make this possible by creating connection spaces at various levels:

- between the management's vision of the future, clients and the development of work processes, involving people: in this sense, the proposed method is characterised by linking management consultancy with a learning process that generates change;
- between the development needs of work processes and those of people: the methodology is also characterised by a co-generative link between interventions on processes and those on people (coaching, counselling, etc.); they are called upon to review their own ways of thinking and implicit epistemologies, activating a personal evolutionary perspective in the organisational context.

After 10 years of collaboration in the CNR project, Silvano Del Lungo<sup>1</sup> pointed out what he considers to be the special features of the methodology:

- the exploratory and experimental element: “the careful transition from the first exploratory phase of the intervention, a phase with an accentuated consultative as well as formative flavour, to the renewal phase (subdivided into change definition and change support and integration)”;
- the connection between personal biography and organisational biography “which allows in the training practice to recover and concretely relate the transitions from one stage to another of the individual’s experience with the changes that have taken place in the organisation of the company and with the new changes in the present required to cope with the environment and the needs of development”;
- the element of rhythm in processes of change “... the attention paid to the rhythm of learning, carefully formalised by successive themes, by exploratory modes, individual and group, by reflective modes, by multi-channel listening modes: in other words, at three levels (of contents, of emotional experience, of the will to act)”.

Finally, Del Lungo points out that:

“The distinctive aim of this methodology is, therefore, the following: to promote, in such critical passages, the adaptation of the company (understood as an organisational system based on the behaviour of a community of men) to the changes in the market, to maintain and improve the effectiveness of the process that goes from suppliers to production transformation and the client... The new methodology responds to a problem typical of the era in which the methodology is affirmed, that of the globalisation of markets and their rapid evolution, which in turn requires a continuous evolution and refinement of the organisation and the organisational behaviour of company operators. Alongside this problem, there is, in fact, also a new opportunity: the fall of the conflict between capital and labour, typical of the 1970s, and the opportunity, in the face of the emerging risks that undermine corporate competitiveness, to address them through a dimension (or a path) of co-entrepreneurship between capital and labour... in

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1 See Del Lungo (2008, 2010) who, having taken part in the project from the very beginning (from 2000 to 2015) outlined its peculiarities with respect to the experiments and publications that gradually defined the methodology. On the figure of Del Lungo and his participation in the CNR project see footnote 4 chapter 1 and Rizziato (2010).

the face of new problems in the economic/industrial context new methodological approaches are needed to focus on and solve the new problems. These new approaches, however, have to be based on a solid and, of course, new theory”.

In the article reporting these reflections, published in 2010 in *Learning News*, the magazine of the Italian Trainers’ Association, Del Lungo then invited the Italian trainers’ community to open a dialogue on the methodological proposal resulting from the project. This dialogue and confrontation has been fruitfully initiated and continues with some members of AIF, involving other associations representing the world of consultancy, managers and enterprises. The work has been extended to the context of the IMO International Foundation, in the 11 countries where it is active with groups of consultancy and action research, to experiment for forms of development that are increasingly suited to enhancing the social identity of people and the meaning of their work. These groups work on the foundations proposed by the HOLIO methodology, which is based on a new view of the individual as a synthesis of complexity and as an evolving system in the evolving organisational system.

The “human system” consists of our cognitive, emotional and volitional dynamics, the awareness and development of which depend on how we consciously work on them. Therefore, we have to “take seriously” our inner reality and learn to read how it is reflected in organisational life and the relationships that characterise it.

We need “training” (as the TRASE path proposes) to become familiar with our own mental, emotional and action models, trying to “observe them from the outside” and transform them, listening to the sense of the direction we want to take with respect to our own biography, in the broader context of the biography of the organisation. This will be possible by exploring the possibilities that arise when we take concrete steps in the desired direction. The HOLIO methodology is thus characterised not only by support in carrying out a particular decision but also and above all by consciously working on how the decision arises in us.

The exercises proposed are very effective for this purpose and are aimed at “moving steps” both internally and externally, thus characterising HOLIO as a methodology for “action”.

The HOLIO methodology highlights the need for a new level of responsibility, far beyond what can be “regulated”, but no less important. First at the top, which will have to create the right visions and appropriate settings to share them in practice, activating people. Secondly, that of the



“intention” that everyone activates in overcoming their own behavioural spontaneity to reach a new level of personal and socio-organisational awareness.

Being able to create new ways of relating in this sense also generates a space of possible new morality which is created starting from the awareness that the intention that animates our thoughts influences the quality of the interaction which must have the purpose of giving added value to our interlocutor for his paths of change, always considering the framework of the development of the organisation and its contribution to society. The fact of seeing the colleague as an evolving being, taking note of one’s own and others’ mental constructs and attempts to overcome them, creates greater caution in the expression of judgements, facilitating a broadening of perception.

The whole HOLIO pathway is characterised by stimulating this “intention”, as an individual activation, taking one’s leadership in hand, which we have defined as horizontal. It has two values: a personal one, as it focuses on connecting the inner world to the effects of actions, and an organisational one, as it is aimed at consciously connecting the external dimension of the organisation, i.e. its client/beneficiary with the internal part, the collaboration processes.

It is in the double connection between personal and organisational identity development that the concept of co-creation, creativity and sustainability takes on a deep and concrete meaning.

The HOLIO methodology, therefore, proposes transformative learning that takes place in a form of autopoiesis between identity and personal biography and organisational identity and biography, considered in the broader territorial context.

Thinking of the three phases of organisational development, as proposed in the HOLIO methodology, as a process linked to the possible evolution of workers’ consciousness, a synthesis image emerges, which makes it possible to generate an organic vision also in working contexts.

We can see the pioneering phase as the initial stem of a plant with the first branches, in which everything is still enclosed in an interconnected potential: people depend on the decision of the “pioneer/leader”, there is empathetically lively participation and strong client perception. The second phase, the phase of differentiation, is like the birth of leaves (we often talk about tree diagrams), in which the plant starts to grow and shows various parts expanding in space: people have small spaces of autonomy, but they are disconnected from the overview and lose the initial impulse, the

contact with the client. Finally, the third phase of organisational life, that of integration, like the flowering, the completion of the plant in which the seeds for the future are enclosed: people reconnect to the sense of collective work, the client, activating their own responsibility and leadership, expanding the vision of the organisational and personal future, blossoming as individuality.

This possible organisational humanism is also necessary today because the challenges posed by the globalised change are increasingly urgent and are now greatly enhanced by the pandemic crisis. More than in any other period in history, they pose fundamental questions about who we are, what we want to become and the meaning of our development.

The theme of organisational humanism is central, even if we think of the exogenous push that has led many organisations to introduce forms of remote working. The period of the pandemic has, in this sense, given a strong impetus to change in terms of speeding up a process of flexibilisation in terms of time and place of work that had only been theorised for some time. At the same time, the experience has made it possible to appreciate the value of human interaction without technological filters and has made it clear that it is necessary to find new forms of balance between physical presence and remote work, between individual and shared work, between individual freedom and social interaction, between flexibility and a clear working process. The development of working models capable of alternating between face-to-face and remote work calls for an overall rethink of the inspiring principles and values of organisational action.

Adopting advanced forms of remote working, going beyond the concept of teleworking, means going far beyond the idea that this concerns the trivial indication of how much and whether people should be present in the office. The topic of remote working is actually linked to concepts of a very different profundity, such as, for example: the meaning of individual responsibility, the fluidity of work processes, the sense of interaction in presence, the ability to connect to the value of one's work and that of others even in the absence of constant interaction. These are issues that are closely connected to the organisational development processes of the HOLIO methodology described in the book and which today need to be addressed with urgent urgency by renewing traditional working models. The more we move towards innovative forms of time and workplace management, also thanks to technological solutions, the more imperative it will be for organisations to initiate horizontal leadership processes, in which face-to-face meetings can be valorised as an opportunity for systemic-evolutionary connection, as is the case in the generative development process described in the HOLIO methodology.

After many years of application, it has been shown to generate energy in people who, by activating personal leadership, take their biographical direction into their own hands and develop creativity and motivation in their work by making new contributions. The organisation begins to be understood organically and becomes a participatory place of collective growth.

In general, the long action research project has shown that people want to grow, they want to be recognized, they want to express themselves, but, especially for young people, if they live in structures with only utilitarian and reductive inspiring principles, they internalize them and become demotivated, struggling more and more to find meaning in what they do, often falling into depressive spirals, which progressively weaken their identity.

Great responsibility, therefore, as highlighted above, lies with the top management of organisations who may decide to espouse one type of culture or another.

Today, it is increasingly essential to make choices in which the “power of decision” is balanced in forms of micro-power, which become “catalysts of cooperation” and make it possible to deal with complexity (De Toni, Bastianon, 2019). Horizontal leadership is a proposal in this direction, where the “power” that is attributed to those who collaborate in development is a passage of trust, mediated and supported by the setting of systemic connections, the infrastructure of development, which allows the generation of initiatives without falling into anarchy.

Many times in the feedback of the participants at the end of the development cycles it emerged that the fact of having been made part of a common vision and personally involved in taking on responsibilities (from the most basic to the simplest) created energy, motivation and a desire to get involved, opening up new and unimagined spaces for personal development.

In the path realised in the various organisational typologies, both in Italy and abroad in the IMO International network, but also in the master’s courses on horizontal leadership offered in the same network, it was also noted that, when the perception of one’s work identity increases, there is also a form of greater interest in others: the knowledge of oneself, which is realised thanks to the various interactive methods in the work groups, exercised in the HOLIO-TRASE path, leads to seeing colleagues differently, with greater respect, interest and empathy. An important output of the proposed paths is therefore what is generally called “team-building”, which here takes on a multidimensional, complex and purposeful value.

Experiences with the HOLIO methodology have shown that access to a personal dimension at work, which transcends the purely utilitarian level but supports it from a broader point of view, helps in the construction of a collective “transcendence”, of an organisational reality that is increasingly humanised and therefore effective and efficient.

This is the figure of the integrated organisation, the goal of the HOLIO pathway, which is to be considered, in fact, a socially responsible organisation. In it, both the social and the technical-economical system live, thanks to the connection between “vertical spaces” (more or less structured), linked to the objective-performance dimension and “horizontal” ones related to the client-process/people dimension. It is an “adult” organisation in which everyone can responsibly contribute to the achievement of a collective aim, that of offering products/services useful to society.

We can say that the HOLIO methodology, in linking visions and practices in which the essence of the person and of the organisational purpose are respected and valued, has both a moral and a technical element: two aspects that should always be considered in parallel, especially in this historical moment in which the acceleration of changes can create a disconnection with the meaning they are proposing.

The competencies and meta-competencies for systemic-evolutionary development, generated at the end of an initial development cycle with the HOLIO methodology, which is at the basis of horizontal leadership, make it possible to renew the organisational culture and initiate development cycles autonomously, as a driving force to generate a systemic-evolutionary culture that is increasingly widespread in the organisation. This makes it possible to progressively involve the various stakeholders, in particular clients and suppliers, with growing synergies, which can generate forms of new communities.

This is a path that allows the development of what we can consider an “organisational intelligence” which, compared to what is commonly defined as “social intelligence”, has the characteristic of generating not only good relationships but also “good organisations”.

Thus, the way is being mapped out for working contexts, harbingers of culture and principles very different from those of traditional organisations. In a joke, we could say that we have moved from the old logic “you are not paid to think, just do the task as best you can” to “you are paid to think and to create new organisational realities by evolving your thinking”.

In summary, the HOLIO methodology proposes a shift from traditional paths for managerial competencies, based on a rationalistic vision leading to

planned change and project management, to paths for horizontal leadership competencies, based on a systemic evolutionary vision, leading to generative change and process development. This is based on the conviction, supported by the practice of many years, that one cannot promote and govern change with the same skills and competencies with which one governs the ordinary. The concept of process acquires personal and organisational values, thus integrating the vital element, the lived experience: there are no processes without people unless we are talking about pure technology, but even in that case it will be fundamental that the sense and purpose of the process is always in the hands of the people.

The following table summarises the peculiar characteristics of planned change with respect to process development (HOLIO). These dimensions often coexist in organisations, but it has to be considered that the former is suitable for situations that do not require cultural and structural change.

PLANNED CHANGE (project management)	GENERATIVE CHANGE (process development)
Predefined results You already know where you want to go in precise terms (set objectives)	Predicted results Work is carried out step by step, the operational modalities can only be prefigured in principle and there is a continuous re-orientation (image desired results)
Project coordinator or project leader/group leader or superior(s) (vertical view)	Horizontal developer/leader leading an initiative from start to finish involving suitable people to implement the desired results (horizontal view)
Predefined people and roles (definition by function)	Creation of a new network of people identification based on relationships and actions (useful for the processes to be generated)
The linear logic of cause-effect is followed activities → results → objective	Explorative and experimental cyclical logic is followed, adapted to complexity reflection → prospection → action
Known expertise and know-how (technical skills)	Systemic-evolutionary development skills/competencies for moving through complexity (transversal competencies)
Working within predefined patterns (established paths)	Working outside the conventional framework (innovative paths)
The route gives the people involved sufficient security (strengthening of certainties)	The process may provoke resistance/anxiety in those involved because it involves the simultaneous generation of processes and new skills/competencies (stimulus for a change)

*Fig. 8.1 - Comparison between planned and generative change*

The methodology, therefore, proposes a possible way of satisfying the third and fourth level for the evaluation of training programmes according to Kirkpatrick's classification (1994), i.e. the modification of working behaviour and work processes, characterised as "transformative". In the years of testing the methodology, the question of organisations to meet this third and fourth level was often observed, as they were dissatisfied with the traditional training paths used, as they mostly stopped at individual learning.

Finally, it should be pointed out that, in the proposed reference framework and in general in paths which take into account the complexity of organisational systems, as part of wider social systems, the figure of the consultant, the trainer and the researcher must merge into new professionalism, which can question reality with increasingly transdisciplinary competencies, acting as a horizontal leader. It should act as a "development partner", capable of helping its client to "see better" the organisational reality and explore its potential.

The book aims to disseminate the current status of a methodology that has deep roots and has been developed over a long period of participatory action research with the contribution of many pioneers who are passionate about the meaning of human work.

After many years of practice and observation that new visions of oneself and one's social identity can flourish in organised life in developing work processes and their common purpose of service to society, and having observed the energy and vitality that this produces, I hope that the Methodology for Horizontal Leadership and Integrated Organisations can find wide and differentiated contexts of application, as was the intention from the beginning of the project in 2000, contributing to the renewal of organisational thinking. To date, the HOLIO methodology is the basis of the company IMO in Italy, a CNR spin-off, which offers consulting and training for the development of people, organizations and territories and is a member of the IMO International Foundation.

Although we have reached a moment of synthesis with the HOLIO methodology, research continues, to investigate ever more deeply the connections between the human constitution and the development of our potential intelligence, which can give rise to an organisational intelligence, capable of creating places of beauty, meaning and development and responding to the increasingly urgent challenges of sustainability at various levels. That intelligence that can ennoble work and the economy in a way

that is functional to people's growth, calling forth new forces of thought, the part that is peculiarly human compared to other living beings.

The methodology is therefore in continuous development in the context of the IMO International Foundation in collaboration with the CNR-IRCrES Institute and the IMO spin off company. Our work focuses on the dynamics of self-development in relation to the evolution of the organisation and, in a broader sense, of the social systems that we co-create.

In our view, this is a key issue for building a socially sustainable development, in which the fulfilment of the individual and his or her potential is the end of the economy, overcoming the illusion of short-term advantage and the reduction of work to purely utilitarian ends. In a perspective of searching for the meaning of organisational life, observing what emerges as potential, it will be possible to generate broader visions, systemic and evolutionary in fact, or rather "communitarian", as was Adriano Olivetti's dream, to achieve an organisational and social world that mirrors an increasingly evolved humanity.

*"The fourth planet was inhabited by a businessman who counting the stars... He was so busy that he did not even raise his head...to the arrival of the little prince... who asked him: what are you doing with five hundred million stars?*

*Nothing, I own them (he replied).*

*... And what is the point of you owning the stars?*

*I need it to be rich.*

*And what is the point of you being rich?*

*To buy other stars.*

*I, said the little prince, have a flower that I water every day, and it is useful to my flower that I own it.*

*But you are not useful to the stars... The businessman opened his mouth but found nothing to say, and the little prince left..."*

(Antoine de Saint-Exupéry, The Little Prince)





# For Further Reading

## **The courage of complexity in the training for organization development. If innovation is not just a method but also a vision: the case of the HOLIO methodology**

*by Antonia Chiara Scardicchio<sup>1</sup>*

### **Foreword**

The contribution is the result of a research that began in June 2012 and concluded in June 2018, within the framework of the author's association with the CNR-IRCrES. The commissioner, Erica Rizziato, the creator of the HOLIO methodology, expressed the clear intention of entrusting an external observer, skilled in the design and evaluation of training systems related to organisational development, with the study of her work, implemented in various organisational contexts, both public and private, primarily in Italy but also abroad.

The research, of a qualitative nature (Demetrio, 1992), adopted multiple questioning forms (Sità 2012), due to the richness and the subject of study and its fields of application.

The data that led to the final evaluation came from various investigative tools, which the extended period allowed to structure in an eclectic form, enabling access to multiple forms of feedback regarding the characterisations and educational effects detected among the participants in the paths with the HOLIO methodology (on-the-job training paths and the International Master in Horizontal Leadership)<sup>2</sup>.

The research took the phenomenological-hermeneutic horizon as the scientific background of its design (Mortari, 2007; Sità, 2012) and is thus configured as a critical-interpretative study.

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1 Antonia Chiara Scardicchio is an Associate Professor of General and Social Pedagogy and teaches at the Faculty of Philosophy and in 8 courses at the School of Medicine of the Aldo Moro University in Bari. She has taught Design and Evaluation of Educational and Training Systems at the University of Foggia. She collaborates as a lecturer in several master courses for public administration dealing with transversal competencies. She has worked in management training in large companies and organisations of various kinds.

2 The triangulation of the analyses carried out in the final phase took place by submitting the evaluations to colleagues external to the scientific structure of the author, with academic curricula in the field of work psychology and labour law. They had access to documentary sources (reports on the foundation and evolution of the methodology) and empirical data (interviews with selected cases; free feedback in video and paper form). The degree of agreement was complete. For more details on the research see Scardicchio (2019).

## **1. Person, work, community: training is a matter of both material and immaterial**

Work is a hybrid substance: kneaded with materiality and immateriality, at the crossroads between material and psychic, it requires a systemic undertaking of its composite identity (Schön, 1993; D'Egidio, 2001; Morelli, 2009, pp. 70-71; Morelli & Weber, 2005). Yet the experience that both the business sector and the Italian school system have been reflecting for decades is different: treated as merely instrumental, disconnected from questions about its psychic and social values beyond issues of status and role connected to salary and prestige, the “work reduced to practices” (Morelli, 2009, p. 127) has generated training experiences that, even within non-technical visions, have succumbed to the idolatry of performance, emphasizing action at the expense of the actor, the tool at the expense of the end.

Often, even in pathways focused on the development of soft skills, it seems that the only attention to the actor is aimed at the overused theme of motivation. Many practices of “advanced” training have shifted the axis to the immaterial, and therefore psychological dimension of professional action, but positioning on a surface has oxidized the distance between performance and the inner world and between the latter and the real world. Paradoxically, what tends to be excluded, although invisible, has the most tangible weight: the issue of the evolution of individual identities within organizations, the focal knot where inner-intimate – events are closely linked with external – political – events.

The “consistency of clouds,” writes Morelli (2009, p. 8): to say that the immeasurable has weight and, as literature has long claimed, intangible assets evoke attention, not as pathologies to be eradicated but, rather, as the human proprium to consider: even in the economic field. Paradoxically, the working man, even in the polished transition from homo economicus, driven by stick and carrot, to motivational man, driven by dreams and not just needs, has remained unmatched: disconnected from the crucial theme for which work is all one with the mental, emotional, social, symbolic health of every human being and how organizations are places of sense-making for identities, individual and community.

Whether public or private, organizations are physical and cultural places in which adult identities have, through work, the possibility and the necessity to define and redefine themselves: to evolve, precisely, where “growth” concerns not only productivity.

Within this composite vision was the dream, temporarily turned into reality, of Adriano Olivetti. A philosophical inquiry and an anthropological research, he, hybridized the themes of work psychology and sociology of organizations with deeply anthropological and fully political questions: there the option towards a “transcendent” system coincides with identities and projects that do not oppose, but mutually nourish, personal good and common good, subjectivity and community. Anachronistic, it would seem.

Yet the copious contemporary literature on organizational health and individual health (Avallone & Paplomatas, 2005; Argentero, 2009) draws designs where happiness – empirically denoted by indexes and indicators – fails to coincide with only the abilities of stress resistance, chaos management, and problem-solving and assumes the much more complex form of poiesis, of weaving thoughts and actions within an ecologically oriented project – as in the sense woven by Gregory Bateson, Mauro Ceruti, Edgar Morin – to live life with a creative drive (Bateson, 1984; 1993; 1997; Bocchi & Ceruti, 1984; 1988; Maturana & Varela, 1987; Ceruti, 1992; 2015; Manghi, 1998; 2004; Morin, 1983; 1993; 2007; 2011; 2012; 2016, 2017).

The issue is indeed hybrid and multi-layered: although working coincides with doing, both manual and intellectual, isolated performance does not exist. It doesn't exist even for a machine that, despite not having internal movements, exists in reality, or inside a place and time: and so, it is affected and resonates with its exchanges with reality. It cannot exist, except in a trivial and dangerous delusion of neutrality, for a human worker, whether a top manager or a painter. Professional performance is not an object but always a relationship: because it always lies within a meaning, a context, a transaction, and is always grafted, or never neutral but always rooted within a dimension of meaning, in the natural and cultural form of an identity narrative, both individual and relational (Senge, 1990; Polanyi, 1990; Bruner, 1992; Damasio, 1995; Weick, 1997; Alhadef-Jones, 2009).

Nor can the good leap from knowledge to skills suffice (Cepollaro, 2008; Morelli, 2009): much has been written and continues to be written about this, but it's a false Holy Grail, this competence is seen as a keystone, if the verbs of individual actions are declined to infinity and if one does not consider the actor, the agent, the single identity that blends its action with the context, physical and symbolic, and with the dimensions of meaning surrounding the growth/formation of one's self intended itself as “living matter” of training, work, as of the real life of every worker as a “living” being.

And no, the issue cannot be dismissed in the rosy corner of organizational well-being, if liquidated in benefits or, in the best cases, in good union victories that satisfy the animal not only economically but also welfare-oriented that is the human worker: sophisticated forms of carrot to offer to the donkey. There is no long-term result that can withstand breakdowns, without the care of the nexus between professional identity and personal identity (Fabbri & Munari, 1984; Connelly, & Clandinin, 1997; Formenti, 1998; Scardicchio, 2012), singular biographies and organizational biographies, stories of work and stories of true philosophical and cultural heritages.

The HOLIO methodology, the subject of this study, starts from this vision which constitutes, at the same time, its beginning and its arrival. Thus it was designed and experimented with by its main creator and implementer, Erica Rizziato over the last twenty years, in her research activities at CNR-IRCrES and within the international IMO group, in reflective and operative synergy with the research of Boulding (1956), Novara & Sarchielli (1996), Novara (2008), Novara, Rozzi & Garruccio (2005), Lievegoed (1973; 1979), Lievegoed and Bekman (2007; 2010; 2014; 2017), tested in the field in the never interrupted form of action-research: and so it has been the subject of study during work as much theoretical as empirical, aimed at studying its specific quid in the context of the literature on organizational training and organization development, to investigate and highlight elements of effectiveness, innovation, value.

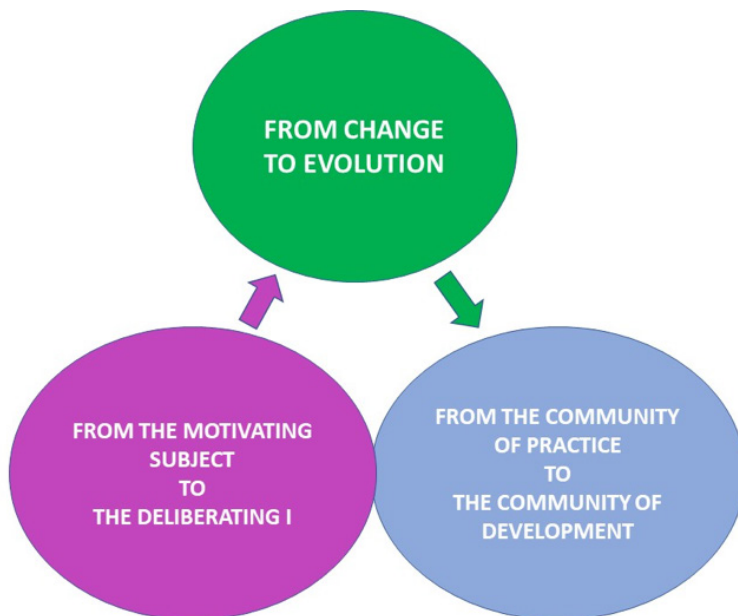
## **2. The Core Focus of the HOLIO methodology**

The analysis of the data collected has allowed us to identify Rizziato's proposal as an approach, both theoretical and methodological, of particular innovation and effectiveness. In this case, too, these often overused terms gain more rigour from being able to reformulate the outcome thus configured, in a form that also better identifies its identity and scientific value. The training and change experience in the HOLIO-TRASE context has shown to distinctly position itself in the field of "transformative learning" studies and practices (Mezirow, 2003; 2016; Kitchenham & Chateaufneuf, 2009; Hunt, 2013; Formenti, 2017), overcoming the naive divisions between knowing-knowing how to be (Olivetti Manoukian, 2010). The approach has emerged as capable of producing not knowledge or competencies confined to specific application frames, but as a promoter of meta-level changes, i.e., relating to transformations of habitus, mindsets, cognitive, emotional, and behavioural styles.

In all the interviews collected and in all the reports analyzed over the six years of the study (Scardicchio, 2019), the LOOI-TRASE experience is described and experienced by participants not as a “training course” but as a true epistemic repositioning, mindset change, and transformation of protocols, processes, behaviours, because it is an experience of interrogation – or, rather, of meta-interrogation, coinciding with a question for meaning about one’s daily actions and, from them, about one’s personal and professional identity perception.

The phenomenological-hermeneutic study (Mortari, 2007) of the training gains indicated by the beneficiaries – cross-referenced with elements collected in the field and in document analysis – has made it possible to outline a map of the key elements that distinguish it in the national and international panorama, concerning the central issues of adult learning and training in organizations.

In addition to constituting the distinctive elements of the theoretical-conceptual analysis of the methodology, the following items represent at the same time the learning outputs highlighted by the empirical survey and the traits that define, in this study, its detected value of innovation and effectiveness.



*The three core focus of the HOLIO methodology*

## *2.1 Core Focus 1: from change to evolution*

Years of literature and fashion trends around the theme, as central as it is exploited and hollowed out, of change management have unveiled the limits of a verb lacking a subject. Emphasizing change itself and innovation without taking care of the bio-professional curricula of individuals, and, above all, without the ability to analyse the complex web that weaves together people, organizations, clients, and markets, does not produce results. The productivity of an organization cannot be reduced to its sole ability to intercept changes in needs and the subsequent alignment of supply and demand. The idolized change is as useless and unproductive as the opposite idolatry towards the status quo.

This is precisely where the distinctive element of the HOLIO-TRASE proposal is positioned, its epistemic focus, the work-meta work aimed at a paradigm shift: here, the value is not the change itself, as if a healthy and productive organization could be depicted with the image of a hamster on a wheel, trained to never stop no matter what happens around it and, in cases of excellence, even able to anticipate and guide the rhythm of movements. Even in this last coveted version, the image of the hamster certainly does not convey impressions of health and organizational well-being, since the action remains so clearly associated with performance delusions and constant performance anxiety, as if the actions, although having a head, were in reality seized by themselves, by a ceaseless motion, and indeed, more similar to that of a crazed swarm.

In prêt-à-porter training packages, the “on change” course is often not very transferable. Even where it has a strong emotional impact, and even when it offers cognitively relevant tools, the uprooting from the real “outside the classroom” does not allow for the introduction of changes in professional daily life, except in the short term: just the time for the emotional impact to wane. Role-playing and case studies are not enough to transform theories and practices into mindsets. The limitation is that change is treated as a theme, an object of study, and a disciplinary subject.

Doctors know all too well that knowing smoking is bad is not enough to change one’s choices: and they know this not only because they encounter disobedient patients, but because many of them – the doctors themselves – smoke. Despite knowing. And even, in their case, knowing well and better. Treating anthropologically significant issues as “subjects of study,” “objects of knowledge” detached from recapitulating identity questions has its appeal because it responds to our deepest needs for simplification and the illusion of control (Ceruti, 2017). But it works as a good anxiolytic only in the

short term, failing to generate identity styles characterised by a deliberate assumption of responsibility in the analysis of processes and uninterrupted project planning.

Even when changing form and moving out of the classroom, the experience of training in the form of process consulting often risks being non-generative: solving the case problem may be limited to the part to be repaired and not generate system changes if the consulting is only in the form of description/analysis and prescription/task in the here-and-now.

In the path proposed with the HOLIO methodology, reality, the problem, and the real case, are the starting point, exactly as in process consulting (Schein, 2009). However, the starting point and the destination of the training work do not coincide with the anxiety of searching for a solution. Not a “training course” to sell “techniques and tools,” nor a practice of deception and training, but rather a work – or, better, a meta-work – that, moving from actions and returning to actions, is rather configured as a restructuring of paradigms.

The steps outlined by the methodology start primarily with a process analysis, process that keeps together the here-and-now but, also and above all, the latent schema that generates them.

I work on the “hidden guides” (related to the “pre-critical” postures of Mezirow’s analysis, 2003; 2016), the search for automatic actions and cognitive, emotional, and behavioural processes that act by default as reactions rather than as deliberate actions (which recall the literature related to tacit knowledge, hidden curricula, and internal working models) is fully centred on reflexivity as understood in international academic literature (Argyris, & Schön, 1998; Carmagnola, 1994; Moon, 1999; West, 2000; Striano, 2001; Boud, Keogh, & Walker, 2002; Hoegl & Parboteeah, 2006; Gurtner, Tschan, Semmer, & Nagele, 2007; Schippers, DenHartog, & Koopman, 2007; Farnese & Frida, 2012; Pineau, 2013; Taylor, 2017). Therefore, participants in the course learn to read reality not as a fortuitous, chaotic, and illegible succession of problems and successes but as a complex design from which it is possible to recognize the multiplicity of levels and interrelationships and to recognize constraints and possibilities, obstacles and explorations, through meta-observations: multi-planar observations between object and background, in the systemic mesh that connects actors, actions, and contexts, both physical and symbolic (Flavell, 1979; Schön, 1983; 1987; Argyris & Schön, 1998; Strollo, 2003; Schön, Striano & Capperucci, 2006; Schippers, DenHartog & Koopman, 2007; Scaratti, Gorli & Ripamonti, 2009).

However, what distinguishes the work of Rizziato from similar reflective and situated practices is that the study of “theories in use” and the rendering visible of the cultures that drive practices, often unconsciously acted upon, does not stop at just the problematic case subject of the training or consulting. The foundation of the HOLIO methodology is akin to Senge’s systemic view (1990), where the awareness of one’s “mental models” is the first step towards the development of “mastery learning,” or processes of personal mastery understood as style, habitus, mindset characterised by the meta-competence that Siegel (2010) has in recent years identified as *mindsight*. Here, too, is the fully systemic form of the outcomes of Second-Order Cybernetics (Von Foerster, 1987) that HOLIO, in a pragmatic form, promotes: not an unspecific change, deified in itself, but the evolutionary sense of a constant attitude to self-observation-thinking and self-observation-acting, experimenting with an ecological view because it is not self-centred (Mortari, 1998; Mezirow, 2003) capable of mobilizing consolidated routines of thought and action, generating continuous processes of sense-making and corresponding action-moving (Rizziato, 2007; 2010a; 2010b; 2014, 2017, 2018a).

In this sense, Rizziato intends and experiments with her care for “evolution,” which belongs to the individual as much as to the organization, the organization as much as to the individual, in an incorruptible equation, particularly in tune with the “emancipatory” tension that Mezirow revisits from Habermas’s study (Mezirow, 2003, pp. 89ss).

In this sense, the core perceived by participants in HOLIO-TRASE paths courses is in the transition from a view of identity - of individuals and the organization - as a state to one as an evolutionary process, where the rhetoric of continuous improvement lets go of the temptation to headless movement and promotes individual responsibility to develop a view of reality that is systemic because it educates to a complex view (von Bertalanffy, 1968; Bertrando & Bianciardi, 2009) of the work reality as part intertwined with a larger belonging, which Rizziato recognizes, as inspired by her “Olivettian” inspiration, in a Common Good that links the organization’s productive activity to the “system-client-world” (Rizziato, 2007).

A change of posture, therefore. It’s “critical reflection” (Mezirow, 1998, 2003): study and shaking of one’s “epistemic premises” which in its formulation seems to me to link to the meta-competencies outlined by Morin (2007; 2012; 2016) and Ceruti (2015) around that particular epistemic position and thus anthropological – and therefore political – involving the ecological/systemic perception of every thought and action



within a modus that conceives the work of the professional as isomorphic to research, exactly as in Schön's vision:

“when the traditional view of professional knowledge is rejected, recognizing that professionals can become reflective researchers in situations characterised by uncertainty, uniqueness, instability, and conflict, the relationship between research and practice is reassembled. Therefore, in this perspective, research is an activity for professionals” (Schön, 1993, p. 312).

If this clearly, yet theoretically, emerges from the theoretical study and documentary inquiry of the paths proposed by Rizziato (2018), as well as from the in-depth interviews conducted over the years with the creator, it is equally true that it emerges with equal clarity also empirically from the collection of feedback from the beneficiaries: everyone in declaring the learnings received, do not limit themselves to indicating benefits of an emotional nature or intellectual growth, claiming to have learned a method or a theory, more or less replicable or applicable. Each participant reports a change of perspective, vision and, therefore, of generation of meaning and actions transferable to their contexts of belonging, even not only work-related. All report the experience as an event of a paradigm shift, in which the professional Self and the personal Self re-see their inextricable intertwining and the work dimension is constituted not only as part of the juxtaposition of identity but as a primary creative/generative modus of being a man and woman.

In this sense, both empirical and philosophical, leadership is horizontal: not an artifice or strategic move of widespread delegation, but acquisition by each professional of their specific field of action as a task with identity and organizational value/meaning: no worker is thus only an applicator (Migliore, 2015).

The element that consistently emerged from the findings is precisely the overcoming of the division that is often experienced in organizational training: here there is no imbalance towards technicality nor, on the opposite – but the same! – towards psychologism. The steps of the protocol are within an experience that keeps identity and works together and that places at the centre the evolutionary issue: organizational life as a tool of individual and collective evolution.

In this sense, the HOLIO proposal recalls, in part overlaps but also “surpasses,” the Model of Dweck (2000) related to the transition from a fixed mindset to a growth mindset. Rizziato's proposal has the ethical

configurations of the American colleague and adds to them a political dimension that embeds individual processes within a transcendent dimension in which the “community of practices” is not only a place of exchange of knowledge and actions but also the very place of development of the “political and transcendent” dimension of human identity – coinciding with the care of the Common Good and the “client” understood not only as a buyer (Olivetti, 2004).

## *2.2. Core Focus 2: from communities of practice, through reflective communities, to “development communities”*

Although, by theoretical choice of the creator, the emphasis of the HOLIO methodology is on individual responsibility, the group and relationality do not constitute mere background elements to the processes, on the contrary, they constitute its central core.

Invited to work on the Self through forms properly attributable to literature related to the development of reflexivity (see the action-reflection-prospection-action cycle, Rizziato; 2010a; 2010b; 2017; 2018), and within a horizon that lies within the practices in literature identified as “communities of practice” (Wenger, 1998; Fabbri, 2007; Lantz & Brav, 2007; Lave & Wenger, 2006; Wenger, Mc Dermott, & Snyder, 2007; MacCurtain, Flood, Ramamoorthy, West, & Dawson, 2010; Lipari & Valentini, 2013; Ferranti, Friso & Frison, 2014), the TRASE processes systematically move the ecological dimension of organizational experience, which is irreducibly individual and simultaneously irreducibly communal (Hall et al. 2005).

Working in groups is also crucial because it leads to a decentralization of self-recognition and the detachment of learning from automatic cognitive processes (and *modus operandi*): the other and others act as mirrors, and the multiplication of vanishing points in the multiple perspectives that the kaleidoscopic mode of the Model activates, ensures that each participant experiences the other-than-self not as a threat, but as a necessity for freedom from their own singular focus—cognitive, emotional, behavioural, which is the crucial obstacle to every evolutionary leap.

Reports from participants in multiple editions of the Master in Horizontal Leadership, as well as those from interviewed clients, just like the vast majority of feedback from participants in the processes (Scardicchio, 2019), unanimously refer to an experience of a reflective community that, by systematically reading its own “theories-in-use” and the practices consequent to them, learns and experiments with a complex look at the

client-organization-person at work fabric: complexity that does not coincide with complication (which already belongs to daily detections) but with the possibility of drawing, from chaos, the space that allows for evolution, small and significant changes capable of keeping the thread that weaves and re-weaves (Gell-Mann, 1979; De Toni & Comello, 1997; Gandolfi, 1999; Weick & Sutcliffe, 2007; Hazy & Uhl-Bien, 2012).

Participants do not report the experience as solely attributable to a reflective community or a community of practice. Both expressions seem unable to exhaustively state the specificity of the methodology. In the feedback, the reference is to an experience that, beyond the space/time of the classroom or the sole guidance of the trainers, reveals itself to be transformative insofar as the work - which learns to also see itself as a task of meta-work - transforms the group of participants into a “development community”: in the participants’ words, the apex concordance pushes towards the identification of this lexical mode to describe the evolutionary vision of the co-participation process, where development, both personal and organizational, does not only coincide with productivity and individual well-being but with feeling an active-creative-generative part of a task - of a meta-task - that reads the positioning of the organization in the market within a vision that is not only economic but also simultaneously ethical (Novara, Rozzi, Garruccio, 2005; Olivetti, 2014; Bekman, 2017, 2018;).

Copious literature in recent years focuses on the connections between performance, success, and organizational climate (Saleh & Wang, 1993; Baer & Frese, 2003), after having gone through the season of the team-working obsession. It is worth noting that, although there are no specific emphases on this issue in the reports on the foundation and evolution of the HOLIO-TRASE paths, participants report among the training gains the improvement of the organizational climate and the increase in well-being resulting from the re-framing of the meaning of practices, functions, roles.

Also around the theme of creativity, Rizziato, in her foundational and evolutionary reports, does not place a particular focus. Yet, it is necessary to note that her educational practices revolve around re-vision and promotions of cognitive and empirical explorations that can be distinctly seen as leaning towards the promotion of creativity (Henry, 2006; Hunt, 2013), where creativity is understood as the findings of contemporary neuroscience, that is, coinciding with brain plasticity that allows the restructuring of one’s consolidated internal models (Siegel, 2001).

Here, creativity does not correspond to “creation” as the production of evocative thoughts or actions or to “something that only concerns the

so-called stroke of genius”, but coincides with “seeing the possible in the existing, providing obstetric actions to bring it out, situating oneself within the possible” (Morelli, 2018, p. 11).

In this sense, the entire HOLIO-TRASE path can be read as significantly oriented towards a systemic view of creativity or converges with complex thinking: a mode of thought aimed at studying constraints and exploring possibilities, capable of thinking of itself not as a unique and supreme point of observation and evaluation (Watzlawick, 1974; 1986; 1988; Bannister & Fransella, 1986). A thought-action with a Deweyan configuration (Dewey, 1961) that therefore lies in the equation Thought=Research, not in Thought=Stasis.

Thus, reasoning around the heart of the primarily systemic epistemic issue, with Morelli’s expressions about the limits of thought not open to its revision, it is possible to identify the constructivist background of the HOLIO methodology and its creative orientation: Every theory is a provisional solution to the pain of thinking. An attempt to free oneself from the effort of searching again...

The theory holds us hostage. While it guarantees us the reassurance that can come from an explanation of the world, it binds us concerning all the other possible explanations of the same phenomenon (Morelli, 2017, pp. 35-36).

In this sense, the reflective work with the exercises proposed in the HOLIO-TRASE paths - both driven by reflective practices focused on the analysis of the here-and-now, and that typical of autobiographical practices - carries out its action of creative drive, experiencing creativity not as a tool or suggestion, but as a challenging metacognitive and metaemotional exercise (Cornoldi, 1995) to re-see, re-think, re-view, re-think (Varisco & Calvani, 1995) and, therefore, to mature pragmatically visible evolutionary steps (the “next step”).

Thus, the methodology proposed by Rizziato promotes the development of the specific human aspect of being an autopoietic and “creative” species in the sense of: “capable of composing and recomposing with different levels of originality the available repertoires” (Morelli, 2017, p. 69) and experimenting with unprecedented actions, for which it assumes the responsibility of constant monitoring and evaluation.

The choice to stay in thoughts and practices, unlearning them whenever they are revealed as “not ecological” (not “factories of Good,” to use Olivetti’s expression that anticipated ecological and systemic issues) reveals its systemic identity: epistemic, anthropological, economic, social, and political.

Dis-learning also requires a healthy/systemic dance with reality (Cecchin & Apolloni, 2003; Formenti, Caruso, & Gini, 2008) in which one is willing to let go of the power that both an individual and an organization receive from their orientation to self-interest alone: letting go of the infantile form of a psyche and an organization driven only by the search for security, towards an individual self and a community whose moves are not just responses to a fear, in a defensive position, or to a delusion of omnipotence, in an attacking position (Kets & Vries, 1999).

Here then, “ecological” lies in the sense of Bateson first, and then of the copious literature that also in Italian research works to connect worlds, languages, contexts, practices, cultures, and knowledge: here “systemic” means connected, not in the mere partial sense of connection via the internet, but in the philosophical and empirical sense of the vision characteristic of the sciences of complex systems: a sense that can be said to coincide with transcendence, where it is understood as a web that knots levels, planes, dimensions, infinitely small and infinitely large in the gaze and discourse around the self and its expression in the world.

### *2.3 Core Focus 3: from the motivated subject to the deliberating I*

The interviewed participants and the reports from graduates unanimously report having experienced overturning and significant the “use” of the “development question” and of the “next step” (Rizziato, 2017, 2018, ch.3.2).

The novelty does not lie, both in scientific literature and in the experiences reported by individuals, in the emphasis on operational translation or in the elaboration of a planning of actions following analysis.

The element identified as “disturbing” – a real breakdown – is in the change of approach that the perspective of the HOLIO methodology provokes: taking it as a task, feeling work as a push/condition for an evolutionary passage. But not based on a pathogenic evaluative push in which the assessment, or even the self-assessment, are in the dynamics – both salary and psychic – of reward/punishment.

Here the “development question” corresponds to summoning as an adult the identity of the individual who is called to self-diagnose both their limits and their potential, not based on a need for individual and organizational survival, in the logic of emergency and panic in dangerous situations, but based on a systemic style that identifies adult identity with the commitment to continuous evolution and thus to constant research, in the form of generating thoughts and actions.

Here the “development question” is not the answer to a problem or a pathological situation to be solved, but is the ordinary, daily question with which to take charge and take care of one’s professional evolution, where the generative impulse is the norm, not the emergency medication.

In particular, the HOLIO-TRASE path breaks away from the emotional drift linked to “motivation” and to the sometimes-naïve vision it leads to. The subject is not conceived as a self-deluding machine that only has to “give itself a push” and, like in the best American movies, tell itself that “anything is possible” and that “limits are only in one’s head” to make it.

Indeed, both statements are undeniable and in line with the systemic-constructivist horizon that characterizes the HOLIO methodology: because yes, certainly the “place” of work is not only external but also, above all, internal; and yes, the “inner theatre” is exactly the scene that every adult is called to script and direct (Bannister & Fransella, 1986; Glasersfeld 1995; Demetrio, 2003), but the HOLIO-TRASE path does not exhaust this complexity in the strategy of “giving oneself motivation” by imagining an always active inner coach motivator at the sidelines.

The anthropological vision of the HOLIO methodology restores to subjects their complexity, as relational neurobiology (Siegel, 2001) reflects it back to us: hence, the work on oneself is challenging and far more significant than an exercise, perhaps even a sophisticated one, of autosuggestion. The tools, both individual and group-based, allow every professional to experience themselves as leaders of development in the concrete form of the competency map they outline (ch.5): a composite framework that conveys an image of adult identity that embraces its deliberative nature and creatively acts, much more refined and demanding than that of self-motivation. As an external observer, it is indeed possible to align the HOLIO methodology within the international literature that has allowed the concept of empowerment to evolve towards that of capability: the settings activated by the protocol are generative activators of capacity-building processes, with a peculiar focus on the dimension – which the creator draws from Assagioli, Boulding, and Lievegoed – towards the transcendent dimension.

With the choice of this expression, generally unusual in this field of study, I intend to say that the HOLIO methodology surpasses both behavioural reductionism and mentalistic reductionism, embedding work, identity, and organization within the unique legacy of the vision-action of Adriano Olivetti (2014). And if the expression may seem out of place in a contribution aimed at discussing work-related issues, the more impressionable reader and scholar may then replace it with the less overused and equally clear

term used for some years by Morelli to describe the same epistemic stance: “referring tension” (2018). Thus, he outlines the posture of systemic, ecological, complex openness, which characterizes the human identity that can, as in Rizziato’s vision, experience organizational life as the specific place of their human formation and evolution, both individual and communal, understood at the same time in the here-and-now, the then, and the future of possibilities: a future from which, feeling responsible, one benefits from perceiving and moving as a subject that is both historical and meta-historical.

Not just – or, rather, not only – a toolkit of organizational practices but, above all, a complexity mindset that allows – as in the feedback from a participant in a training course – to:

“experience life at work, work in life. Which, when you think about it... is the division that is an artifice. And who would have thought” (feedback from participant M12, 2017).

### **3. HOLIO: a complex and composite methodology for “(R)evolutionary Organizations”**

In no way has this analysis mentioned the theme of horizontal leadership, which is at the heart of the methodology to the extent that it becomes an identity and nominative for the corresponding Master’s program. The absence is a choice: given the copious international literature on the theme of leadership, its many forms, and, above all, the many ways of characterizing it, teaching it, and distributing it, it seemed to me that reading the methodology conceived by Rizziato as centred – according to her own twenty-year choice – on leadership, constituted, in my opinion, a partial reading.

The issue of guiding groups in organizations, the rhythm between vision and management, and the aspects of both formal and informal “democratic” management of human resources, for me, has always remained in the background of observation or, rather from the start, it became evident and continued to be so throughout the long period of research as the non-identifying element of the approach’s fullness. Horizontal leadership and the sharing of identity and organizational task to such an extent that it motivates every actor to feel and act as a “development agent” (Rizziato, 2018) appear as a segment of a much broader mosaic. The HOLIO-TRASE journey – as stated by the interviewees and in the post facto feedback – stands out from the multitude of theories and training practices present in research and the training market, primarily because it is not just a training

course. Although Rizziato defines it as a “methodology,” it is fundamentally an anthropological vision, a theory and practice of correlating professional life with the foundational spheres of the life of both men and women, considered as creature/creator and, for this reason, inherently engaged in the dance of life, the *paso doble* between learning and un-learning (Bateson, 1984; 1993; 1997). Practically, this is manifested by moving on all levels of the organization and thus working simultaneously with the management and all the actors of the system (Del Lungo, 2008), not “packaging” and “administering” courses as if they were medicines reserved only for workers.

In the final analysis, the study and field accompaniment of these years has allowed me to focus on the specific motion of the vision and practice of such a particular approach, also evoking learning and reformulations in my scientific research: it is the “unlearning organization” (Akgün et al., 2007), the organization that un-learns is the one that becomes alive and vital, ecologically fertile for all the systems it interacts with. Indeed, in the training part of the HOLIO methodology, the cyclic TRASE path resonates – applied in the forms of leadership that is both horizontal and transcendent – Bateson’s drives around the cruciality of un-learning, Morin’s around the generative potentials of disorder and breakdown, Ceruti’s around the necessity to abandon the delusion of complete knowledge to move towards a research posture understood as a *modus vivendi*.

Therefore, even though it has vigorous and meticulous empirical forms that outline its modalities not randomly but pragmatically, the HOLIO methodology appears, in my analysis, as a philosophical model. It is indeed a proposal that combines a high pragmatic altitude with an equally high and present reflective tension centred not only on the here-and-now but also on properly teleological dimensions, i.e., related to the “ultimate end” or, rather, “goal” of every single professional performance. For these reasons, I considered it inappropriate to focus the lens of study on the sole aspect of leadership. Rizziato’s focus is, in fact, much broader: it revolutionizes visions and ways in the training of human resources with its transcendent thinking in and for organizations. Without any concession to spiritualism or abstraction, nor to the seductive multiple forms of managerial rhetoric, in the vision and practice of HOLIO-TRASE, transcendence takes on pragmatic connotations in the ethical intentionality that places work within the “political” horizon in which the project of personal realization is all-encompassing and not antithetical to the evolution of the community: fully in the “Olivettian” spirit.

The seasons of corporate training have gone through various fashions, and even spirituality has taken the form of suggestive fascination in certain



practices, but the HOLIO methodology distinguishes itself by abandoning the allure of spiritual seduction and, indeed, is characterised by the courage to systematically question practice and, above all, to confront the effort of breaking away with an approach that simultaneously cares for both the pragmatic and immaterial hearts of the formative processes in organizations.

Rizziato's proposal lies within the horizon of reflective, situated, and transformative practices (Kolb, 1984; Munari, 1993; Knowles, 1996; Kaneklin & Scaratti, 1998; Dierks et al., 2001; Mortari, 2003; Merriam, Caffarella, & Baumgartner, 2007; Scaratti & Ripamonti, 2009; Reggio, 2010; Day, 2014), within the systemic perspective of studies around the complexity of training in organizations (Morelli & Weber; 2005; D'Agnesse, 2007; 2012; Morelli, 2009; Mori, 2011, Mori & Varchetta, 2012; Clover et al. 2013): a systemic, complex, aesthetic model. A model that is both particular and global, complex because it is multimodal: it coincides with the care of one's evolving self and with the care of the "living" system that ecologically hosts the organization, its market space, and its interrelations, the client world.

In this sense, the long observation and reception over these years allow me to outline the HOLIO methodology as characterised by a perspective that the expression "(R)evolutionary Organizations" seems to me to reflect: a true process of salutogenesis (Antonovsky, 1996; Lindström Eriksson, 2005; Lindström Eriksson, 2011), capable not only of reformulating pathogenic thoughts and actions but also, simultaneously, of generating thoughts and actions that are generative of development. The spirit and practices proposed by Rizziato generate futures characterised by necessarily evolutionary scenarios, credible because they are centred not on problem-solving, stress or chaos management, or on similar lists of competencies conjugated without a subject, where the unexpected is considered a deviation or pathology of organizational life and life itself. The turbulent variability and the imponderability of living processes are experienced, in her vision and her formative practices, as a vital metaprocess: not a variable to be brought back to order or chaos to be quelled but, on the contrary, an irreducible, vital potential for the organization-in-evolution.

For this reason, the echo of her "Olivettian" inspiration resonates powerfully: care for the individual, care for the identity of each, care for the biographical subject and its non-delegable individual and social responsibility (Morelli, 2009), constitute not the strategy of soothing/bringing the worker back to the alien purposes of the organization, but authentically represent the only real starting point towards achieving the common organizational identity goal. Individual, situated, biographical and, at the same time, common, cultural, and political.

Here the transcendent horizon is not an alternative to the need for profit, the immaterial is not an alternative to the material. And ethics is not the opposite of economics.

The “Olivettian” dream’s community-organization returns in Rizziato’s “(R)evolutionary Organizations” and, as in the legacy she consciously received, it is not an alienating superstructure but a constitutive dimension, appropriating of human systems. Humanely, and professionally. Relevant both economically and psychologically.

Thus, it is dutiful to report that in almost all the reports of those who have followed the HOLIO-TRASE paths in the company and of those who have mastered the methodology, having experienced both its translation into practices and the sharing of its foundations – curiously – better – emblematically – a word often foreign in the places of training appears: soul. To identify the heart of the approach, as in the constant references of the creator during the interviews conducted over these six years. Soul: unusual weight. Immaterial, yet relevant: in feedback, as in the declared learned ways of rethinking, rethinking oneself, acting, evolving. An imponderable variable. Perhaps inscribable within a scientific protocol.

Though rooted in philosophical history and Jungian psychoanalytic tradition, the “knowledge of the soul” – which Maria Zambrano (1996) has left us as a fertile legacy, and which Rizziato, without even knowing her, seems to fully embody – sincerely struggles to find its place in the rigour (or rather, in the rigour presumed by science that identifies it, if at all, with only what is measurable and reducible to objectively certifiable indicators and yet always – dramatically, humorously – arbitrary because defined as such by a situated, interpreting, irreducibly partial intentionality).

The issue should not be confused or mixed with fideistic matters. “Evoking the spiritual in transformative learning” (Dirkx, 2016, p. 137) means, as is typical of practices of transformative learning: “to take seriously our inner lives within the teaching and learning that take place in the contexts of adult education” (Dirkx, 2016, p. 137).

Just as in the perspective of Dirkx (2012a; 2012b), here the HOLIO methodology places intentionality and formative design within a horizon that includes its systemic weight – incidentally, again, the weight of clouds –, and hence moves towards an expansion of the view on training and organizations that allows us to say, with the necessary corresponding courage:

“we are no longer merely pursuing learning to fulfil a requirement, to achieve a certain grade, or for the expectations of a certifying body. Although these can be relevant aspects in the external world, they simply become part of a broader learning landscape, made more vivid and alive through our awareness of our inner world and its workings.

...

One might object that such a perspective cannot find its place in these kinds of educational contexts, that this type of extremely personal, private vision is better kept out of the classrooms, and that this perspective claims the spiritual and even religious dimension of education. In my opinion, learning and making sense of what we study and our lives involves a personal dimension. How could it not involve the person?” (Dirkx, 2016, p. 138).

...

“I am not recommending psychotherapy for a group of learning subjects, nor am I suggesting adopting a religious view of learning. I believe that learning involves the Sacred and thus implies the spiritual, as it represents a sort of background, a context matrix in which virtually our entire life is staged” (Dirkx, 2016, p. 138).

The Author clarifies that in no way is it about claiming “a particular religious perspective” but that dealing with training – clearly meant as in Rizziato’s proposal, that is, as “ecological” and “evolutionary” – necessarily involves dealing with issues “at the border with the sacred” (Dirkx, 2016, p. 138).

For further clarification, he continues specifying:

“I do not intend to claim here the adoption of special spiritual or religious practices, such as breathing techniques, rituals that are not part of our regular classroom practices, or the use of cultural icons that have little or no relevance to our field of study” (Dirkx, 2016, p. 138).

Dirkx, therefore, focuses on the theme of sensemaking, arguing the need to “reformulate the meaning of meaning-making in adult learning” (2016, p. 139), shaping it, as in the HOLIO vision, as inextricable – and both individual and communal, and psychological and social, and material and “spiritual” –: “ecological” then, in the epistemic, economic, and simultaneously ethical and political sense that Bateson, Morin, and Ceruti have been delivering for decades and that Mortari has further explored in the contexts of education.

Thus, Rizziato's proposal responds to and resonates with the instances of "nurturing soul work" (Dirkx, 2012a), as seen from the multi-planar framework of competencies for the systemic evolutionary development in complexity it outlines and promotes (ch. 5, Rizziato & Nemmo, 2018).

Perhaps, then, for the reader and scholar in need of more pragmatic references, that "knowledge of the soul" (Zambrano, 1996), which still deals with critical issues of its incarnation, will here be better translated into the more recurrent expression in the words of the founder who, regarding the request to identify the core of the vision and methodology herself, has used the same core concept over all these years, the same then found as the identifying thread of the feedback collected from participants in her educational paths: "connecting work to the meaning people attribute to their presence in the world" (Rizziato, interviews 2013; 2014; 2015; 2016; 2017; 2018).

In this regard, before I encountered these six long years of observation and accompaniment, I had only come across good, even sincerely excellent, theorizations. Here I have also encountered the corresponding practices.

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What competencies will be able to face the challenges of complexity?

What forms will ensure the existence of healthy organizations economically, in terms of efficiency, effectiveness, sustainability, meaning and motivation? On what basis can sustainable forms of remote working be conceived?

To respond to these challenges, the book proposes a shift in the paradigm, a new vision of the person and the organization and a methodology that connects them, so generating the change in a systemic and evolutionary way: **the methodology for horizontal leadership and integrated organizations** (HOLIO). Inspired by the good practices implemented in Adriano's Olivetti company and the work of psychiatrist Bernard Lievegoed, the methodology results from a long international action-research project, that involved many stakeholders and took place in the CNR context with the participation of the IMO International Foundation. The methodology allows organizations to become modern "communities" of human and social meaning, "integrated organizations". This will be possible thanks to the training of new competencies at the very basis of a leadership suitable for complexity: the horizontal leadership. The Author then speaks of a "humanism for organizations," proposing a path that, given the challenges posed by artificial intelligence and the augmented reality it proposes, stimulates an "augmented" human intelligence, capable of generating new forms and ways of working consciously and responsibly. This will be crucial to give artificial intelligence the right space so that it does not overwhelm personal development.

Addressed to trainers, consultants, managers, entrepreneurs and social researchers, the book contains examples, exercises and application cases, to allow the reader to directly experience all, or part, of the path described with the methodology. It proposes interventions modes in organizations that allow the overcoming of behavioural spontaneism and a renewed self-consciousness, of the context and oneself as co-creators of the context.

## **Erica Rizziato**

Erica Rizziato is responsible for the action research activity on motivation and development in organizations and local communities at the Research Institute for Sustainable Economic Growth (IRCrES) of the Italian National Research Council (CNR). She teaches in the Integral Ecology degree program at the Pontifical Antonianum University in Rome and has long been a member of the UNI Technical Commission for the development of the international standard ISO 26000 on the social responsibility of organizations. She is a member of the board of the IMO International Foundation (Institute for Human and Organizational Development), which works with the principles of the HOLIO methodology in 11 countries and she is the president of the IMO company, a CNR spin-off that provides development consulting and training for companies, government institutions, training schools, and territorial agencies.