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Developing resonant leaders through emotional intelligence, vision and coaching

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THE IMPACT

Mary Tuuk was inspiring as she sang the National Anthem for the opening of the Fifth Third Bank River Run in Grand Rapids Michigan to nearly 20,000 runners and 40,000 spectators in May 2012. She is not what people typically think of a 48-year-old bank president and community leader. A year earlier, she was highly respected as the chief risk officer of Fifth Third BankCorp. She had helped steer the company through the turmoil of the financial crisis and the repayment of the Troubled Asset Relief Program (TARP) federal money. Mary's career in risk management was fulfilling, but she wanted something else.

As part of the company's leadership development program in emotional intelligence, Mary had the opportunity to contemplate her ideal future life and work in 10–15 years. As she peeled back the layers of others' expectations, traditions, and a siloed career remaining in the specialty of risk management, she created an exciting image of herself as a line executive responsible for profit and loss (P&L). The more she discussed this with her executive coach in the program, the more the idea developed and her enthusiasm grew.

The CEO (chief executive officer), Kevin Kabat, who had encouraged executives to enroll in the program, listened as she shared her dream with him. He promoted her to be president of Fifth Third's Western Michigan affiliate. Her law degree and 16 years in banking prepared her for a major functional role, but as a general manager and leader of a major division with \$6 billion in assets and \$8 billion in deposits, she would have to be a chief executive. Mary needed to leverage her full talents and refine them as a top executive. Kevin agreed that taking charge of the third largest division of the bank would be a perfect experiment, opportunity and challenge.

Fast forward to a year later and the results are dramatic. Mary is propelling the bank to new revenues, profits, and growth. As a bank president, she has commercial and retail

banking, consumer lending and investment advisory services reporting to her. As a Michigan native, Mary embraced the Western Michigan community. Mary now serves on numerous community boards and sees her role as a community builder as well as a bank executive. Her new role also enables her to help advance women in business, which is another high priority. She created a program at a Grand Rapids school, Calvin College, to, as Mary says, "help young women envision a career in business and dream big." The program brings high school students to campus and facilitates social networking with business leaders in the community.

But the good news doesn't stop there. Singing was something that Mary enjoyed doing, but struggled to find the quality time to do in her previous role. Through the personal vision she crafted in the leadership program, Mary created a plan for her personal renewal that included her love of music and singing. She began to sing regularly with several church choirs. Mary also bought a condo on the lake in Western Michigan which she visits frequently, if she can, to be close to nature. In her words, this is where she "recharges her batteries."

Kevin Kabat said, "She's doing a good job and I think she's having a lot of fun; I think that shows in the results."

THE LEADERSHIP DEVELOPMENT PROGRAM

In the wake of the economic meltdown of the country's financial institutions, many organizations sliced training and development activities as a visible and expected cost-cutting measure. However, one Midwestern organization, Fifth Third BankCorp, took a unique and courageous stand and partnered with the faculty at Case Western Reserve University to initiate an executive development program for the Bank's top 370 leaders. Through a program consisting of classroom learning, supplemental executive coaching, and action learning projects, senior executives have the opportunity to achieve deeper self-awareness of their leadership

behavior and enhance their capabilities to be more effective change agents and relationship managers, considered key business goals for Fifth Third. The program is anchored in the principles of emotional intelligence, resonant leadership and holistic balance and encourages participants to become more mindful of their leadership behaviors.

Program Development

Prior to launching the program, the Organization Development team at Fifth Third spent a year working with the faculty at Case Western Reserve University to fully understand their approach to leadership development and to determine how it might best be applied to drive cultural change within the bank. Through attending a series of Weatherhead Executive Education programs, the entire OD (organizational development) team (as well as a member of the bank's instructional design group) earned certificates in emotionally intelligent leadership and coaching. This prepared them to be internal advocates and champions of the leadership development approach within the bank.

Next, members of the Weatherhead faculty team spent time at the bank interviewing the CEO and each member of the executive leadership team. The purpose of these interviews was to help them gain a better understanding of the culture of the bank, as well as the bank's key strategic initiatives and leadership development opportunities. This would enable them to customize and contextualize the program in such a way that it was meaningful and relevant to all participants. What followed was the development of a series of programs structured as two-day learning experiences designed to take leaders in the bank through a multi-level change journey starting at the individual level and then progressing to dyads, groups and teams, and ultimately organizational level change.

Program 1 – Emotionally Intelligent Leadership

The first program was designed to set the stage for the upcoming series of learning experiences and to create a compelling desire for change from the individual to the organizational level. Prior to start of the program, participants completed a set of exercises that required them to reflect upon their core values, their passions, their life purpose and what they would like their leadership legacy to be. They would later draw on these reflections to draft a personal vision statement. Participants also completed a 360-degree feedback process, with the results to be delivered during the program.

In this first program, participants learned what it means to be a resonant leader, how and why emotionally intelligent leaders are able to create resonant relationships with others, and how the chronic stress of being in a leadership role can impact one's ability to sustain effectiveness over time. Participants were also introduced to an intentional change process that would serve as the framework for their development throughout the series of programs. This process included the receipt of the 360-degree feedback on their demonstration of the emotional intelligence competencies, as well as the completion of an assessment on their preferred learning style.

After the program, participants received three one-on-one executive coaching sessions. The first two coaching sessions were conducted with an assigned coach from Weatherhead Executive Education. These first two sessions focused primarily on their personal vision and their strengths and development opportunities relative to that vision, as informed by the results of the 360-degree feedback process. The third coaching session focused on the creation of a plan of action to learn and grow in new ways to facilitate the attainment of their articulated vision. This third coaching session was conducted by a member of the Fifth Third Organization Development group, who also helped each participant to link his or her personal learning plan to an individual development plan within the bank.

Program 2 – Coaching for Intentional Development

Approximately one year after completing the first program, individuals then completed a second program. Whereas in the first program participants were focused primarily on their own personal development and growth, in the second program the focus was on how they might most effectively coach the personal development of others. This represented a shift from the individual level to the dyadic level of change. Prior to this second program, participants completed a series of worksheets about two individuals they would be coaching after the program. They also completed a second round of the 360-degree feedback assessment to enable them to track their development progress since the time of the first program.

In this second program, participants shared stories of the impact the first program had on them both personally and professionally. They then learned the fundamentals of effective coaching conversations, as well as learning a coaching framework based on the intentional change process that they experienced personally in the first program. To adequately prepare participants to effectively coach others using this framework, the second program was largely focused on skill building. Therefore, throughout the program individuals engaged in a series of coaching exercises conducted in trios. In these exercises, one individual would coach another while the third person in the trio observed and later provided feedback. The trios were also observed and facilitated by a "master coach" from either the Weatherhead team or the Fifth Third OD team. The role of the master coach was to provide direction and guidance as needed as well as to provide in depth feedback and answer any questions that participants had about the coaching process.

After the second program, participants received two additional one-on-one coaching sessions. The first session was with their Weatherhead coach and included an update on their personal vision, as well as a review of the second round of 360-degree feedback and a discussion of the progress made over the past year. The Weatherhead coach also discussed with the participants their preparation for the homework assignment from the program, which was to practice coaching two individuals using the framework learned in the program. The second session was with the Fifth Third coach, who had an updated discussion with the participant about the progress and evolution of their learning plan and

individual development plan. During this second session, participants also discussed the results of their practice coaching efforts and received additional feedback and guidance related to their coaching of others.

Program 3 – The Future

During the third phase of the effort, a series of specialized workshops will focus on specific competencies, like empathy, adaptability, and mindfulness. During this period, it is hoped to bring the earlier programs to the middle managers.

Meanwhile, an additional program will focus on management teams and building resonant and emotionally intelligent organizations. The objective of the work in this phase of the effort will focus on building a culture of engagement and compassion. Techniques will be explored to enable the bank to be agile and adaptive and serve customers in new ways.

Between 2010 and 2012, 370 of the organization's leaders have completed the leadership development experience with numerous stories of personal and professional transformation emerging. In this case study, we share some of these stories and propose the merits of approaching leadership development through a process grounded in fostering emotional intelligence and holistic, intentional change.

RESONANT LEADERS INSPIRE PEOPLE

Mary Tuuk is a resonant leader. Being “resonant” means being in tune or in sync with others around you. She engages people around her, those reporting to her and others. She talks to them about what is important in their lives and work – their personal and professional vision. She listens to them because she cares about them. They feel it and respond in kind, sparking an environment of open dialogue, mutual respect and trust!

Building relationships of shared vision and caring is difficult in the easiest of times. But in an embattled industry like banking, it is a major challenge. Imagine trying to get people excited about the future, engaged in renewal and sustainability of their performance and energy when the world seems to be crashing around them. In 2002, Daniel Goleman, Richard Boyatzis and Annie McKee introduced us to “resonant relationships” through emotional intelligence in their book *Primal Leadership*. Richard and Annie expanded this in their 2005 book *Resonant Leadership*, by showing how effective leaders use their emotional intelligence to build shared hope, compassion, mindfulness and playfulness in their relationships. Just as Mary Tuuk engages her employees and community leaders in knowing that they are building their bank and communities together, she asks her direct reports about their vision for a better future. They respond with enthusiasm as the conversations steer away from fixing current problems to dreaming about a better life and engaging work in the future. Then, as effective leaders do, she brings them back to present challenges and goals, but this discussion now takes on a different vibe. The discussion is in service of the great image of what might “be” in the future. The target of the effort is a set of possibilities, something more than just goals – it is goals with a context steeped in the bigger picture of their shared purpose.

OVERCOMING LEADERSHIP STRESS

Before the leadership development program, Mary did not realize that the chronic stress so typical in day-to-day functioning brings on cognitive, perceptual and emotional impairment. Over time, people who may have been resonant with others, lose touch and drift into dissonance. For others, they never had it in the first place. The toll of this chronic stress on each person is huge.

Emotions are contagious. People set off the stress in each other in milliseconds and start a self-perpetuating cycle. Mary learned that by paying attention to her own renewal *and* engaging people in certain types of conversations, she could help ameliorate the ravages of chronic stress and actually help people rebuild their cognitive, emotional and perceptual talent. They become sustainable in both their commitment and effectiveness.

Resonant relationships, in which people feel in sync with each other about their shared purpose (i.e., vision, mission and values), their shared caring for each other (i.e., compassion), tuning into and paying attention to yourself and others (i.e., mindfulness), and being playful stimulate the neuroendocrine system called the Parasympathetic Nervous System. Mary's lake house is a place of renewal for her. This helps the body, mind and then spirit rebuild itself. When she talks to people after a weekend there, she is enthusiastic and eager.

After conversations with Mary, people feel optimistic, engaged, challenged, and lifted – they feel inspired about the future and its possibilities. In this state, people exceed others' expectations and even their own sense of what they can do. And then they want to do more. Because of the increased openness and higher functioning, people in this state are more adaptive, innovative and creative, and are more capable of learning and changing.

INTENTIONAL CHANGE THEORY

This desired process of change is described by Intentional Change Theory (ICT), as shown in Fig. 1. As explained in earlier work by Richard Boyatzis and his colleagues, ICT suggests that sustained, desired change is most likely to occur when five (5) discoveries are experienced. The activation of an individual's Ideal Self is the first discovery and includes one's passion, purpose and core values. These components are often integrated and expressed in a personal vision statement. Once a person taps into his/her deepest desires, he/she is ready to face the sometimes awkward awareness of how he/she is coming across to others, in terms of what is called the Real Self. Those areas in which the Real Self and Ideal Self are in sync are considered strengths. Areas where there is a gap could be considered weaknesses. Recognition of these strengths and weaknesses becomes the second discovery and is manifested in the creation of a Personal Balance Sheet.

The third discovery in the change process is the development of a learning agenda – a framing of learning goals and actions that the individual enthusiastically looks forward to trying. This is distinctive from a performance development plan, which is often stressful and depresses one's motivation to learn and change. The fourth discovery is the actual experimentation and practice with new behaviors, thoughts

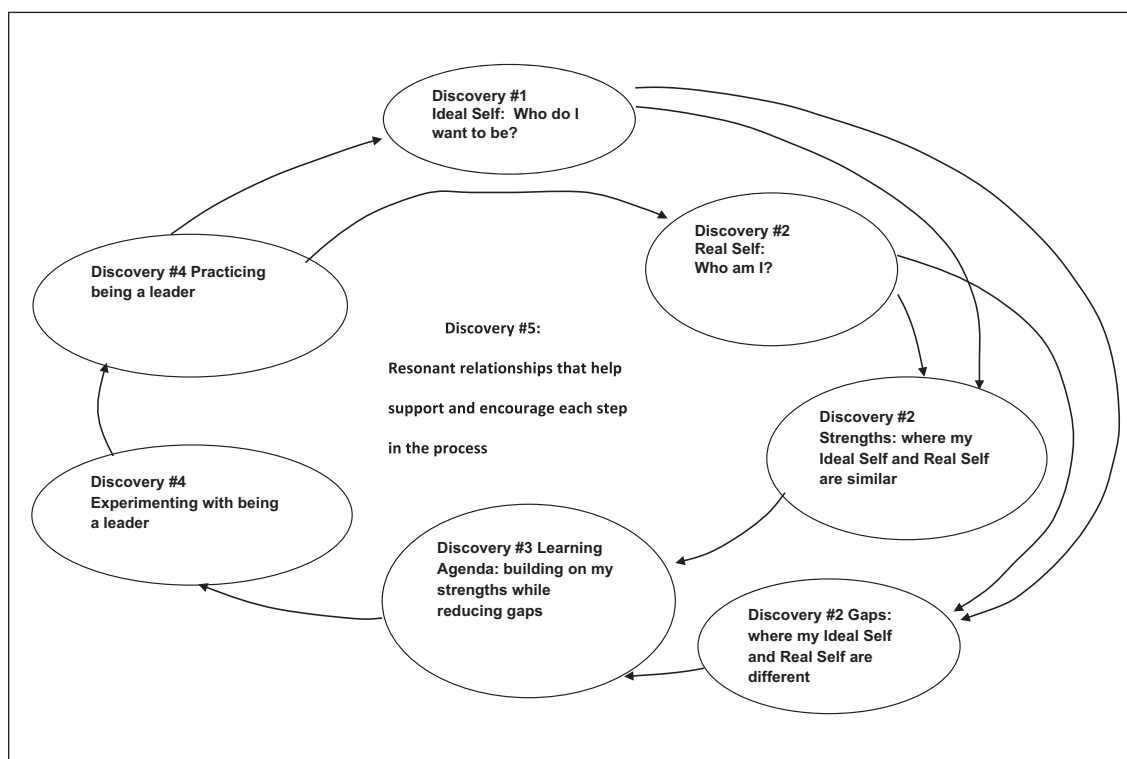


Figure 1 Boyatzis' Theory of Intentional Change (Richard Boyatzis, 2001, used here with special permission).

and feelings that – when implemented – move a person closer to his or her vision while leveraging top strengths and shoring up weaker abilities. The fifth stage of the process is focused on fostering and maintaining a set of trusting bonds or relationships to offer support and help throughout the change process. This five-stage discovery process served as the overarching framework for the entire leadership development experience.

REVITALIZED LEADERS ARE INSPIRED AND SUSTAIN IT

Everything was going great as chief auditor and executive vice president of Fifth Third Bank for Bob Shaffer, but something was still missing. Bob had personal changes he wanted to make that were brought into focus during the program. One of the experiential exercises asks a person to reflect on mind-body-heart-spirit balance. In talking to his coach about the reflective exercises, Bob said, “I’m out of balance on all of them.” He could feel how this was dragging his energy down and threatening his sustainability as a leader. He even worried how it might have been affecting the people around him. This often happens to leaders.

The approach to personal vision in the workshop was surprising to him. Bob said, “It’s the first time in my career where I’ve been to a program like this with a specific focus on not only my job skills, but more importantly, on my personal development as a leader. It was the first time that I felt it was okay in the workplace to talk about me.”

Separate exercises were used to elicit thoughts, feelings and dreams of each of the components of the Ideal Self, as shown in Fig. 2. The coach encourages the person to discuss

each exercise, look for patterns in their reflections, and to consider possibilities.

The chronic stress of the day-to-day activities is multiplied by the power stress a leadership role. The chronic stress, so typical of most executives, results in persistent arousal of the Sympathetic Nervous System (SNS), the body’s stress response. Not only does this result in decreased immune system functioning, but it leads to cognitive, emotional and perceptual impairment. Each challenge becomes bigger and the innovative solutions elude your clouded state. In their article on why leaders should be coaches, Boyatzis, Smith and Blaize (2006) explained how these natural defense processes of the body can become sources of even more stress and reduce the sustainability of the leader’s effectiveness. The one antidote is activation of the body’s Parasympathetic Nervous System (PNS). This system ameliorates the ravages of chronic stress and enables the body, mind, spirit and heart to literally rebuild itself.

By asking Bob to reflect and develop a personal vision for his ideal life (and work) 10–15 years in the future, the program faculty invoked the PNS. As research has shown, experiencing hope, mindfulness, compassion or playfulness elicits the PNS. Then, the brain kicks into high gear and a person is able to be more open to new ideas, emotions and people – and to consider possibilities for the future.

On the desired balance issue, Bob’s coach said, “Just pick an aspect.” The coach knew that to engage the personal vision, it helps if the person can feel some feasible efficacy about the future as shown in Fig. 2. Bob responded instantly to the coach that he would commit to improving his physical health. He explained that a couple of his good friends go to a personal trainer, and are always talking about him. He called the trainer the next day. Like the coach in the program, the

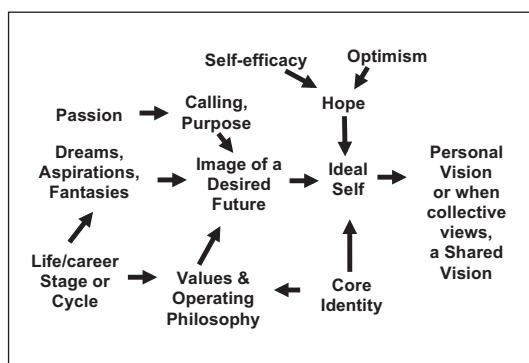


Figure 2 Components of the Personal Vision from the Ideal Self (Richard Boyatzis, 2007, used here with special permission).

trainer asked what he wanted to achieve. Bob said, “I want to live a long healthy life with my wife and three daughters and walk my daughters down the aisle. I want to run the Loveland Amazing Race. My wife had been doing that and she had been a runner and I missed that part of her life. . . I’d be standing at the finish line waiting for her. I also want to be a positive role model to my family. I want to lose 100 pounds!”

Guided by a clear personal vision and the support of an executive coach and a personal trainer, Bob reached some amazing milestones. He lost 95 pounds and successfully finished the Amazing Race with his wife and now works out six days a week. Bob said, “It was a great feeling. She pushed me hard and we had a great time and had a lot of fun.” His new energy was evident to his employees and peers at work. He was truly a changed person and it showed. The Case Western and Fifth Third executive coaching which is part of the program was a major source of support and reminder for Bob. As he said, “I never had follow-up coaching after a program. It really established the accountability. . . taking the excitement and passion you have in the workshop itself and sustaining it.”

EMOTIONAL INTELLIGENCE IN RESONANT RELATIONSHIPS

Emotional and social intelligence competencies have been shown to predict effectiveness in leadership, management and professional jobs in many countries of the world. They can be said to be the behavioral level of emotional intelligence (EI) and social intelligence (SI). In other words, to be an effective leader, manager or professional, a person needs to understand and skillfully manage his emotions appropriately based on each person or situation and understand the emotional cues of others in order to effectively interact with others.

These competencies appear in three clusters: (1) Cognitive intelligence (CI) competencies, such as systems thinking and pattern recognition; (2) Emotional intelligence (EI) competencies, such as adaptability, emotional self-control, emotional self-awareness, positive outlook, and achievement orientation; and (3) Social intelligence (SI) competencies, such as empathy, organizational awareness, inspirational leadership, influence, coaching and mentoring, conflict management, and teamwork. Other competencies appear to be threshold competencies. That is, they are needed to be

adequate, but more use of them does not lead to effectiveness. Given research to date, these would include: knowledge (technical and functional), deductive reasoning, and quantitative reasoning.

Emotional and social competencies represent the specific behaviors that enable a person to generate a sense of shared hope and vision with others, shared compassion and shared mindfulness – the key components of resonant leadership relationships.

In this program, EI and SI were assessed using a test called the Emotional and Social Competency Inventory (ECI-2), developed by Richard Boyatzis and Daniel Goleman and distributed worldwide by The Hay Group. It is completed by asking a program participant’s boss, 3–5 peers, 3–5 subordinates, spouse or partner, 3–5 friends, and 3–5 customers to describe the frequency and nature of their specific interactions. The participant also completes a self-assessment version. All of these are taken on-line, compiled and fed back to the executive in the program and later reviewed with the executive coach.

POSITIVE AND NEGATIVE EMOTIONS IN LEADERSHIP

The Positive and Negative Emotional Attractors pull individuals, dyads, teams and whole organizations toward them. The Positive Emotional Attractor (PEA) occurs when the parasympathetic nervous system is aroused and an emphasis is placed on future possibilities, hope, individual and collective strengths in order to move the system toward a desired end state. The Negative Emotional Attractor (NEA) is invoked when the sympathetic nervous system is aroused and a focus is anchored in problems, fear and apparent weaknesses in a person, team or organization. The positive movement along Intentional Change stages as shown in Fig. 1 occurs when a PEA state is aroused sufficiently to “tip or trigger” the person into the next discovery or stage of the process.

Once each executive at Fifth Third Bank engages his or her own personal vision and hope for the future, the program objectives shift toward how to engage others in these conversations and renewal processes. In other words, instead of always relating to others within the Bank through problems, the idea and methods help a person incorporate joy, hope, possibility and other positive conditions on a frequent basis.

COACHING WITH COMPASSION

In traditional coaching, most managers or executives discuss a person’s accomplishments and then quickly move to the things they should do to improve. Since there is seldom checking if the person wants to go in this direction, we call this “coaching for compliance.” You are coaching the person toward compliance with your or someone in authority’s image of what they should be and how they should act. This approach to coaching is common in many organizations.

While sometimes needed, coaching for compliance pulls people into a defensive posture, the NEA. Instead of opening them up to new possibilities, it typically results in a person engaging in compliance-coping in the short-term, and then eventually forgetting it all and returning to their old ways. In the NEA state, people often feel pressured and are on the

defensive. In time, this and other forms of stress build and the cognitive, emotional and perceptual impairment becomes a limiting factor in their performance, their ability to sustain performance or adapt, innovate and learn.

The benefits of coaching in the leadership program were so widespread and so apparent, both to the coach as well as the people being coached, that a second phase of the program was developed to train each executive to be a better coach and mentor. In this experience, executives learned and practiced a different approach to coaching, one we call “coaching with compassion.” This form of coaching engages the Positive Emotional Attractor during most conversations and meetings. Coaching with compassion prioritizes the establishment of a caring, trusting relationship between the coach and the coachee and anchors the coaching conversation on positive emotions and the discovery of the Ideal Self. A caring coaching relationship is characterized when the coach is emotionally in sync with another and committed to helping that individual. Goleman and colleagues propose that successful leaders leverage emotional and social competencies to foster caring relationships. Quick and Macik-Frey add that authentic and deep interpersonal communication is

essential for supportive, positive relationships to thrive within organizations. When coaching with compassion or to the PEA become typical and widespread, then an organization begins to change its culture in terms of its norms and values.

This is where the multi-level aspect of Intentional Change Theory becomes essential for system change, as shown in Fig. 3. To help a person move toward his or her own desired future, others in the person’s life system need to be involved. If the relationship between any two people is to be renewed and sustainable, then it is likely that not only does each person have to engage in development and intentional change, but so do the teams of which they are a part – and the larger organization. In this way, 50 years of research on sustained change shows that seldom does a desired change “stick” unless other levels in the system are also engaged in a process of intentional change. Fifth Third Bank understood this and designed the process to intentionally evolve to include increasingly larger groups within the Bank.

Most observers would assume that multi-level work means moving the training or intervention throughout the management levels in the organization. That is also essential if the

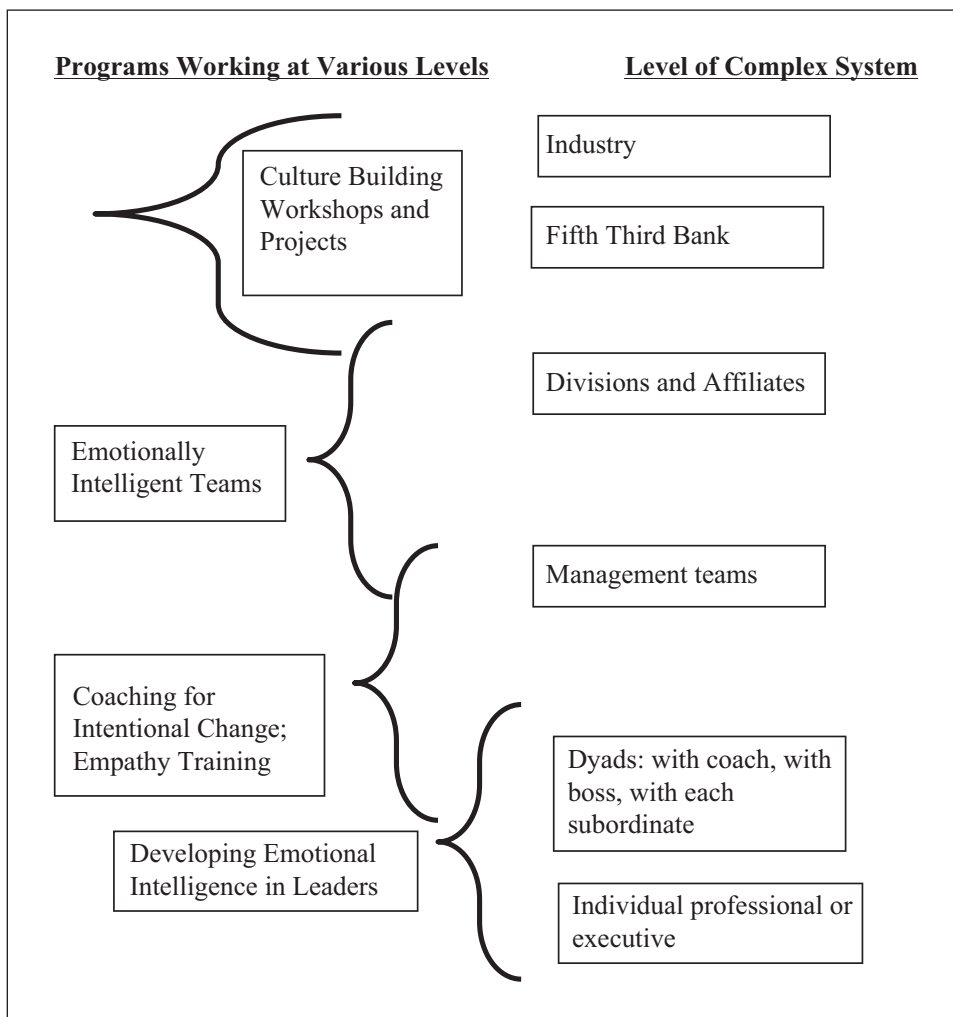


Figure 3 Multi-Level Model of Leadership and Organizational Development at Fifth Third BankCorp.

teams, business units, and whole organization are to change. But that is not the only meaning of working at multiple levels. Each level might have somewhat different shared vision, shared real self (team or organization culture), different shared learning agenda, and overlapping resonant relationships to enable the process to continue.

EMERGING NEW LEADERS

Paul Moore was Fifth Third's customer experience leader. It gave him ample opportunity to work in all of the business of the bank. His desire was to "move up" and lead a larger system of the bank. He was working with his manager about this aspiration and his personal development. Paul felt he was ready. As a result of the two sets of workshops in this leadership development program, Paul is now senior vice president and division head of Central Operations. He directs operations for the entire Bank! As a result, Fifth Third Bank has a new and excited visible leader both within the bank and in the community.

Paul reflected on the coaching he had about his vision and values. "I determined the two most important things to focus on are my family and my career." Along with his wife, Paul continued his involvement in their church and its school. Having one teenage daughter and an 11 year old son would seem to be enough of a challenge, but Paul wanted more. He talked to his coach about getting closer to his daughter as she fully enters her teenage years. Now, he takes his daughter and son skiing a couple times a year, and they invite their cousins so it becomes an extended family event.

Paul joined the Madisonville Education and Assistance Center Board, where the Cincinnati Operations Center is located. This community is part of Greater Cincinnati. As the largest employer in the community, Paul felt the bank should continue to play a major role. The associates of the bank contribute through food drives, wish trees, education tutoring and assistance. Paul helped this community agency take a bigger role. Paul was able to help MEAC become a United Way Agency.

Doing good work for the community is more important to Paul than simply generating good PR for the Bank. He was born and raised on the west side of Cincinnati. The dog fence in his yard encircles his yard and his neighbors – who happen to be his in-laws. As he says, "So when the dog goes out it goes to Grandma's."

For his career, Paul wanted to run operations for the bank, an area that has about 2,100 employees, or 10 percent of the workforce. Through working with his manager and then his coach, he put together a compelling argument as to why this major promotion should happen sooner rather than later. He applied for it and was excited to learn that he got the job. As one of his first moves, he decided to include coaching with compassion or coaching to the PEA as a part of their day-to-day way of doing business. Paul believes in the power of coaching and wants the culture to become one where people can talk about problems AND opportunities AND dreams AND possibilities.

EFFECTING THE BOTTOM LINE

Are all of these program components helping Fifth Third Bank? In the opinion of the CEO, Kevin Kabat, it is working more than he ever thought it would. As he says, "Our business is all about people...it's all about serving our customers...taking care of each other... working together collaboratively to create better solutions and to really understand what our customers need and what they want." As a result after almost three years of these programs, he feels that Fifth Third Bank has, "a far deeper dialogue today of what the issues are, about what our concerns are, about what the potential solutions are... it's not just one or two people... it is the entire team participating in a very, very different way, in a great way...it really does show through... it really has made a difference." His commitment to development of the human capital of the bank is dramatic.

Longitudinal research is underway to document the nature and degree of change in EI and SI shown at the bank and changes in engagement, as well as customer experience.

CONCLUDING THOUGHTS

Typical leadership training programs have little impact on sustainably changing the person's behavior, especially in terms of the EI and SI competencies that predict effectiveness as has been shown in numerous reviews. But a program first developed in the early 1990s at the Weatherhead School of Management at Case Western Reserve University has shown dramatic improvements as far out as seven years after participating in the program. Applying this program in a regional bank, along with essential components at other levels, like improving dyads, teams, the organizational units and communities within which they operate, has shown impressive changes in executives' lives and work. Doing such multi-level development is awkward and costly, and therefore, internal executives do not seek it nor do consultants offer it often. But it is in the personal development of an holistic vision, discussion of this with a coach using techniques of pulling the person into the Positive Emotional Attractor, and working the same processes with others reporting to the executive as well as in the organization and community that prove most potent in their sustaining value. Of course, longitudinal empirical research is needed to substantiate these qualitative case illustrations. We offer this story as a sign of hope that with the appropriate processes and methods, we can fulfill the dream of transformative, and positive personal, professional, organization and community development.



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