9 Coaching for Wisdom: Enabling Wise Decisions

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The Purpose of Coaching

What the world needs now . . . is wise leadership! Now, more than ever, our collective fate rests in the hands of leaders who decide and act either wisely or foolishly. Masterful coaching has the potential to both enable and ennoble leaders for our sustainable common good.

Wisdom, according to the late American historian Barbara Tuchman (1984), is 'the exercise of judgment acting on experience, common sense and available information' (p. 4). Anything less is 'folly'. And folly in leadership is as pervasive now as it ever was. 'Know my son, with how little wisdom the world is governed,' advised Count Axel Oxenstierna, Chancellor of Sweden, 1632–1644, during the Thirty Years' War (Tuchman, 1984, p. 8).

There is no doubt we want our leaders to have more rather than less wisdom when it comes to making difficult decisions affecting our lives. But how do we know who is wise and what a wise decision is? In the rapidly changing environment of both commercial and government enterprises what seems a wise thing to do today can easily be deemed folly over time, and often within a very short time.

Business leaders, particularly, must make operational and moral decisions in the face of unprecedented complexity. Expertise, intelligence, and experience are necessary but no longer sufficient to enable leaders to make far-reaching (and potentially catastrophic) decisions in a world of permanent incompleteness. The ultimate consequences of the continued 'march of folly' are now too great to ignore. What is needed is

a way to bring reason, compassion, and creativity together to facilitate decisions for the common good, not just for private gain or unbalanced small group interests. The way to do this is through the intentional activation of wisdom in leaders.

Empirical studies show the domain of wisdom overlaps with intelligence, personality, and adult development. Yet, like EQ (emotional intelligence), certain components of wisdom appear open to improvement through interventions such as coaching.

Kilburg (2000, p. 228) first made the claim that 'executive coaching, when done well, deliberately facilitates the emergence of wisdom in clients'. This was the starting point for my own discoveries about coaching and wisdom. 'Executive coaching may best be considered as a pre-eminent learning framework for inspiring leaders to apply wisdom decision-making processes and tolerance of complexity through chaordic systems to achieve a common good' (Webb, 2005, p. 92). Kilburg (2006) continues to make the same assertion (albeit with somewhat less confidence) that 'perhaps we can improve the odds that individual executives and dedicated executive groups will be better able to think, feel, and act wisely more routinely' (pp. 329–330). If it is possible to coach for wisdom, then surely coaching can have no higher purpose than to elicit wisdom-related performance in leaders worldwide.

The Nature of Wisdom

Wisdom is an ancient topic. Yet the study of wisdom in psychology is quite recent. 'The subject is complex and elusive,' noted Birren and Fisher (1990) in the first compilation of psychological thought on wisdom, 'but one that clearly seems worthwhile to pursue' (p. 330).

The emerging domain of wisdom has four major constructs of relevance to coaching:

(1)   Wisdom as a system of expert knowledge (the 'Berlin wisdom paradigm', e.g., Kunzmann and Baltes, 2005).
(2)   Wisdom as a property of a person (e.g., Ardelt, 2005).
(3)   Wisdom as interaction between person, task, and situation (e.g., Sternberg, 2005a).
(4)   Wisdom as a 'mapping' process (Kilburg, 2006).

Arising from research into ageing at the Max Planck Institute for Human Development and Education in Berlin, Baltes and Smith (1990) defined wisdom as 'expert-level knowledge in the fundamental pragmatics of

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life' (p. 95). Smith, Staudinger, and Baltes (1994) described five dimensions of wisdom-related knowledge:

(1) *Rich factual knowledge*: general and specific knowledge about the conditions of life and its variations.
(2) *Rich procedural knowledge*: general and specific knowledge about strategies of judgment and advice concerning matters of life.
(3) *Lifespan contextualism*: knowledge about the contents of life and their temporal (developmental) relations.
(4) *Value relativism*: knowledge about differences in values, goals, and priorities.
(5) *Uncertainty*: knowledge about the relative indeterminancy and unpredictability of life and ways to manage it.

These five dimensions are considered as criteria for measuring 'wisdom-related performance' in individuals using 'think aloud' protocols in response to difficult dilemmas in life. Using this approach, Baltes and his colleagues have been able to determine that wisdom-related performance is not necessarily age-dependent (one can see foolish 'baby boomers' and wise 'Gen Y's'!). Performance increases sharply during adolescence and young adulthood, but on average remains relatively stable throughout life with peak performance more likely in the 50 to 60 age group (Staudinger, 1999).

Wisdom seems to overlap IQ and EQ, but it is a unique dimension according to Staudinger, Lopez, and Baltes (1997). They found 40% of the variance in wisdom-related performance could be predicted by measures of intelligence, personality, and their interface. But intelligence alone contributed only 2% of the variance, as did measures of personality alone. While there seemed to be a coordinative aspect of wisdom-related performance between intelligence and personality, 15% of the variance came uniquely from the 'intelligence–personality' interface (specifically cognitive style and creativity). An additional 22% of the variance came from parallel measures of wisdom-related performance using the five wisdom criteria.

In the Berlin wisdom paradigm, wisdom is described as a 'metaheuristic' – a high-level system of knowledge and frameworks – that helps individuals make difficult decisions about the conduct and meaning of life. It includes knowledge about the limits of knowledge and the uncertainties of the world – a knowledge with extraordinary scope, depth, measure, and balance – and used for the good or wellbeing of oneself and others; and while it is difficult to achieve and specify, it is a perfect

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synergy of mind and character, knowledge and virtue and it is easily recognized in others (Baltes and Staudinger, 2000).

However, recognizing wisdom in others presumes that there are characteristics that reside within the person. Wisdom has traditionally been conceptualized as an idealized state or an endpoint of adult development. Jung (1964) described a dream of being a wise old woman or a wise old man and Erikson (1950) defined wisdom as the eighth stage of psychosocial development. Wisdom may be the ultimate expression of behavioural complexity within an individual, the 'fifth order of mind' according to Kegan (1994), and reached by very few adults. Yet, Staudinger (1999), in suggesting that wisdom-related performance is relatively stable throughout the lifespan, opens up the possibility that everyone may posses more or less 'wisdom resources'. In much the same way, Goleman (2001) utilizes the idea of 'emotional intelligence competencies' to explain the situational activation of EQ in individuals.

People with a recognized high level of wisdom might reasonably be expected to have developed positive personality characteristics, such as maturity, integrity, and generativity, and to have overcome negative personality characteristics such as neuroticism or self-centredness. Ardelt (2003) measures wisdom by assessing the attributes and personality characteristics of wise individuals. She identifies the simultaneous presence of three dimensions of personality as both necessary and sufficient for a person to be considered wise:

(1) The *cognitive* dimension: a desire to know the truth and attain a deeper understanding of life, including knowledge and acceptance of the positive and negative aspects of human nature, of the inherent limits of knowledge, and of life's unpredictability and uncertainties.

(2) The *reflective* component: self-examination, self-awareness, self-insight and the ability to look at phenomena and events from different perspectives.

(3) The *affective* component: sympathetic and compassionate love for others.

Surveys have been developed to measure similar person-centred characteristics of wisdom such as the SAWS (Self-Assessed Wisdom Scale) (Webster, 2003), the Servant Leadership Questionnaire (Barbuto and Wheeler, 2006), and the Wisdom Development Scale (Brown and Greene, 2006), but Ardelt's 3D-WS (Three Dimensional Wisdom Scale) is so far the most promising, reliable and valid instrument for measuring latent variable wisdom (Ardelt, 2003).

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In contrast, Sternberg (2005a) suggests that wisdom may emerge as a combination of both person characteristics and decision-making style within the particular situational context. Wise decision making is in the balance – in knowing what to do on what task in what situation and against what timeframe. From the PACE (Psychology of Abilities, Competencies, and Expertise) Center at Yale University, Sternberg (2005) has defined wisdom as 'in large part a decision to use one's intelligence, creativity, and experience for a common good' (p. 37).

Sternberg's balance theory of wisdom (1998) is based on tacit knowledge which refers to 'knowing how' rather than 'knowing what'. Tacit knowledge is an aspect of practical intelligence that helps individuals solve everyday problems by utilizing knowledge gained from experience. As expected, tacit knowledge increases with experience (more so with how the experience is used rather than the amount), correlates only modestly, if at all, with IQ and personality, and it provides significant prediction of job performance beyond conventional IQ (Sternberg, 2003). The 'balance theory' defines wisdom as 'the application of tacit knowledge as mediated by values toward the goal of achieving a common good (a) through a balance among multiple intrapersonal, interpersonal, and extrapersonal interests and (b) in order to achieve a balance among responses to environmental contexts: adaptation to existing environmental contexts, shaping of existing environmental contexts, and selection of new environmental contexts' (Sternberg, 1998, p. 353).

Wise leadership however, is a special case and goes beyond the mere balance of competing interests and responses, according to Sternberg's (2005a) WICS (Wisdom, Intelligence, Creativity Synthesized) model of leadership. It must involve synthesizing intelligence (academic and practical/tacit), creativity (skills and attitudes), and wisdom (balancing interests and responses, moderated by values, in pursuit of a common good) to achieve wise outcomes for all possible stakeholders.

Similarly, Kilburg (2006) makes the claim that wisdom in leadership, particularly in executives of large commercial and government enterprises, is a special case. Taking a lead from the Berlin wisdom paradigm he defines executive wisdom as 'an expert system in the fundamental pragmatics of organized human life' (p. 47). He suggests a methodology called 'wisdom mapping' for encouraging the emergence of wisdom in executive decision making. Any situation faced by the leader is mapped onto a pathway that starts with the initial story and conditions, and then follows six areas of awareness:

(1) *Self-awareness*: the individual executive.
(2) *Family awareness*: the person's nuclear and families of origin.

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(3) *Group awareness*: the group with whom he or she works most closely.
(4) *Organization awareness*: the organization(s) that the executive leads.
(5) *Situational awareness*: the complex situation that the leader faces at any point in time.
(6) *Moral and ethical awareness*: the moral and value lenses that often unconsciously influence the behaviour of the leader.

'When all six of these types of awareness illuminate the daily performance of a leader, he or she has the highest probability of exercising Executive Wisdom' (Kilburg, 2006, p. 141). Executive wisdom emerges as a result of *discernment* (a combination of rational and intuitive perception), *decision making* (time frame, perspective and planning), and *action* (implementation) linked dynamically and interactively with each other through *experience*, *feedback*, and *evaluation* (Kilburg, 2006).

Enhancing Wisdom

There are three ways in which wisdom-performance may be enhanced:

(1) Life experience (e.g., Brugman, 2006);
(2) Teaching skills and ways of thinking (e.g., Sternberg, 2001a); and
(3) Short-term interventions (e.g., Glück and Baltes, 2006).

Wisdom is not merely the product of age but it does seem to emerge in the course of learning from life (Brugman, 2006). Certain experiences can lead to the cumulative development of wisdom such as being a parent or a mentor, living through individual and historical life events, reaching a level of equanimity in the face of the end of life, as well as professional training. For example, clinical psychologists were found to perform at least as well as 'wise persons' in wisdom-performance experiments (Smith, Staudinger, and Baltes, 1994; Baltes, Staudinger, Maercker, and Smith, 1995).

Can wisdom be taught? Sternberg (2001a, 2001b) has developed a curriculum for teaching wisdom to sixth-grade children. His course on wisdom 'encourages students to develop their own values while understanding multiple points of view', and 'can be made part of any subject matter, because wisdom is a way of looking at the world' (Sternberg, 2002, p. B.20). He teaches students the usefulness of *interdependence*: how to recognize and *balance* their own interests, those of other people, and of institutions; that the *means* by which the end is obtained matters,

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not just the end; the roles of *adaptation*, *shaping*, and *selection*, and how to *balance* them; how to form, critique and integrate their own *values* in their thinking; and the importance of *inoculation* against the pressures of unbalanced self-interest and small group interest (Sternberg, 2001a, p. 238).

Social collaboration appears to enhance wisdom. Pascual-Leone (2000) acknowledges the role of mentors in facilitating the 'external path' to wisdom (for mentors, read 'coaches'). Staudinger and Baltes (1996) found that participants who discussed life problems with a significant other person and then reflected on the conversation before responding outperformed a standard-instruction control group in wisdom-performance. However, an equal effect was found in participants who only imagined discussing the problem with a significant other person. In the 'philosopher's dream' intervention, participants who were instructed to imagine travelling to various regions of the world on a cloud and to reflect on the differences in cultures and peoples before responding to wisdom tasks showed higher levels of wisdom-performance than a control group (Böhmig-Krumhaar, Staudinger, and Baltes (2002), reported in Glück and Baltes (2006, p. 680)).

This suggests that wisdom-related knowledge may be latent in people until activated by a wisdom-task or when faced with difficult life problems. Asking the question, 'try to give a wise response' to a difficult life dilemma seemed to enhance wisdom-performance, particularly in those who had high wisdom resources to begin with (crystallized intelligence, life experience, and the personality-interface factor 'Self-regulation and openness toward growth'). However, for those who were low on all three wisdom resources, asking the question caused a decrease in their wisdom-performance (Glück and Baltes, 2006).

Similarly, Kilburg (2006, p. 62) asks executives (who might reasonably be expected to have at least a moderate level of wisdom resources) a series of questions to support the emergence of wisdom such as, 'What is the wisest thing you have ever done as a person or as a professional? If you are a leader in an organization, what is the wisest decision or action you have ever taken? What made the decision or action wise? When and how did you know it was wise? What criteria did you use to judge its merits?'

Using questions *intentionally* to activate the individual's conceptions of personal wisdom depends on their developmental preparedness, their level of engagement with the coach, and the particular outcomes expected of the coaching assignment. If however, coaching is a deliberate intervention to move the client along 'the path of progressive development' (Kilburg, 2001, pp. 256–257) toward some higher level of functioning as a person, and particularly as a leader, for the achievement

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of agreed goals (e.g., O'Neill, 2000; Peltier, 2001, Greene and Grant, 2003), then eliciting wisdom resources is consistent with the practice of coaching.

Coaching for Wisdom

I define coaching as an intentional dialogue between a leader in an organization and a coach who uses a wide variety of behavioural techniques and methods to shape a *journey* from one place of identity and meaning to another place – from which the leader can more *wisely* manage his or her own life and the life of the organization.

Following from Lenhardt (2004), I conceptualize the journey as a cyclical model of coaching narrative which transitions from what is *apparent* (and evident) to what is *potential* (and discoverable), and back again (Figure 9.1). There are two levels of meaning in what is apparent:

(1) The *environment*, consisting of the structures and systems through which the individual operates.
(2) *Behaviour*, which involves communication methods, relationship management, and managerial style.

The next three levels of meaning represent potential for discovery:

(3) *Attitudes,* which calls into question the individual's beliefs and values, those that govern his or her life, work, relationships, whether to trust or not to trust, and how he or she sees the world.

Figure 9.1   The coaching journey.

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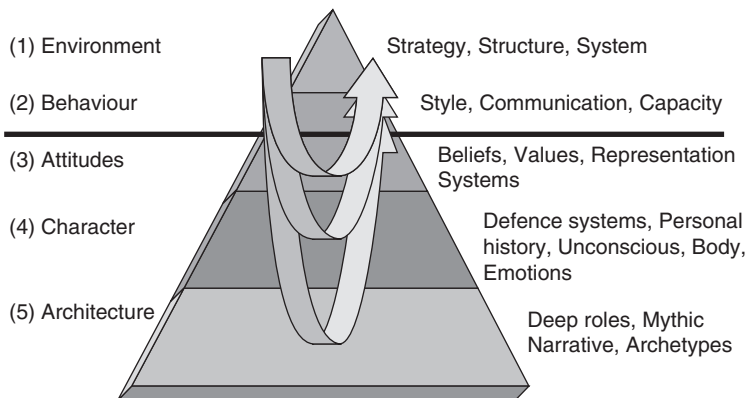
(4) *Character*, as an aspect of personality, where the person's defences and unconscious beliefs, developed over their life history, reside.

(5) *Architecture*, which constitutes the most intimate development of the person, beyond the defensive and blocking systems, to the essential nature of human consciousness or 'spirit', and the recognition of mythic narratives and archetypes that give deep insight to 'life, the universe and everything' (Webb, 2006).

In order to elicit wisdom-thinking, wisdom-decision-making and wisdom-performance I use an intentional coaching process – following Drake's (2007) narrative coaching model – which I call the FORMAT model of coaching for wisdom (Figure 9.2). This is a way of conceptualizing the coaching journey from what is apparent for the client to what is potential and back again. FORMAT stands for: Framework – Observations – Reflections – Meaning – Actions – Test.

Each coaching session takes the following course:

(1) *Framework*: This is the most visibly apparent domain of the client's experience – the context, the current conditions he or she faces at the moment. The key question here is, 'What's the story?' The next stage is:

(2) *Observations*: What is the client seeing in the present situation? What takes their attention? What behaviours are they aware of in themselves and others? The key question is, 'What do you notice?' Next is:

(3) *Reflections*: This is the transition space between what is external and apparent and what is internal and potential. Now the client explores their own awareness and interpretation of things at the attitudes level of meaning. The key question is, 'What do you value, and why?' Next is:

(4) *Meaning*: The most profound realizations and understandings take place at the levels of character and architecture. The client is encouraged to review his or her story from different perspectives. The use of myths and archetypes can help connect the client with their deepest sense of identity. Here is the Socratic question, 'What is truth (in this situation)?' This is where the client's latent wisdom resources are most likely to be aroused. The next stage is:

(5) *Actions*: To retrieve value from these understandings the client must contemplate potential actions – what might it be possible to do about the situation. This is transitioning back to the 'real world' and the key question is, 'What are your options?' The final stage is:

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(6)   *Test*: Now it is time to 'prototype' the suggested action steps – to
      consider the practical implications of each action and what obsta-
      cles might need to be overcome. The key question is, 'Which of
      these actions will work?'

At the top of the cycle the client goes back into the *Framework* of their
story with new insights and actions. And this, in turn, draws the dialogue
back into observations and reflections for deeper understanding of
meaning. Depending on the nature of the relationship between the
coach and the client, both may be prepared to spend longer periods of
time at the deeper levels before returning to the 'apparent world' with
fresh insights and realizations (see Figure 9.2).

When conducted well with clients who are ready, I have seen a kind
of personal 'wisdom compass' emerge from this process, partly from the
individual's 'implicit theories of wisdom' (Bluck and Glück, 2005), but
also as a co-constructed (between coach and client) practical template
for how to make difficult decisions in the face of uncertainty.

For example, Allen, a regional general manager for a major Australian
bank was facing an unusual dilemma. He had been asked to accept
either the position of Head of retail banking, or the position of Head of
investment banking. Both positions were equally attractive, and he was
free to choose either one! Should he seek to develop his leadership
skills by taking the Retail Banking role? Or should he stay in the invest-

Figure 9.2   The FORMAT model of coaching for wisdom.
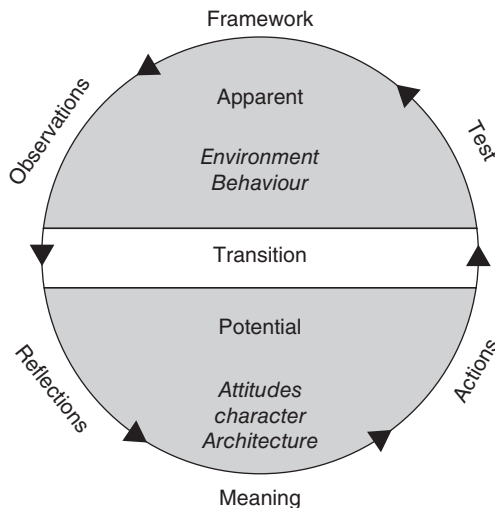
ment banking line of service from where he derived his expertise? Allen had undertaken a lot of leadership training and personal development up to this point in his professional life so he had a highly intelligent and functional grasp of career-critical decision making. But he simply could not make up his mind on this one.

Following the FORMAT model, our coaching narrative spent a lot of time in the *Meaning* area. From here Allen developed a kind of 'checklist' of *Actions* derived from recalling how he had made successful decisions 'with no right answers' in the past. The list included things like 'I try to see the whole rather than the parts', 'core values (what is important to me)', 'I am prepared to back myself, and at the same time ask, am I being honest with myself?' He agreed to *Test* these actions with reference to other strategic decisions he was making at the time. At one of our follow-up sessions Allen *Observed* that these criteria seemed to suit his decision-making style quite well but he *Reflected* that he was no closer to making a decision on which position to take. However, in the *Meaning* stage Allen embedded these components into a deeply resonant story which we co-constructed about being a winemaker. This was the key. Allen subsequently made the decision to take up the Head of Investment Banking and not long afterwards he found that this position gave him greater scope than he had foreseen to exercise the leadership skills he sought. For Allen this was a wise decision.

Bob was a long-serving business development manager for an international manufacturing firm. The company was being acquired by a competitor and he was faced with three options. Should he stay with the company and almost certainly have to relocate his family from Australia to South Africa? Should he breach his contract and negotiate a similar position with the takeover company? Or should he look for another job altogether? Each decision carried long-term consequences for his career and for his family. Acting too soon might deny some of the emerging possibilities. Waiting too long could risk losing any certainty. Bob's decision was further complicated by his ambition to pursue a general manager role. As part of the coaching journey, Bob produced a drawing which summarized the components of 'how to make a wise decision' for him. He drew three concentric circles. In the middle he placed his core value, 'God'. Around the next circle he placed important *interests*: 'family focus', 'shared success', 'spiritual wellspring', 'healthy body and mind'. And in the outer circle he placed the *responses* available to him such as, 'tolerance', 'servant heart', 'accounting skills', 'industry knowledge', 'risk–reward', 'church community'. It occurred to me that Bob had re-created Sternberg's (1998) balance model but with a circumplex layout! He went on to make a successful decision about what to do with his career during a tumultuous takeover and I recognized his

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drawing as a new way to conceptualize the use and application of wisdom resources (see Figure 9.3).

Drawing from Sternberg (2005b), Kunzmann and Baltes (2005), Kilburg (2006), and Ardelt (2004), I define *wisdom in leadership* as:

(a) the application of the five wisdom criteria of the Berlin wisdom paradigm, drawing from tacit knowledge and personality characteristics (cognitive, reflective, and affective),
(b) through the acknowledgement of core values,
(c) balancing the interests of self, stakeholders, and the organizational community,
(d) by adapting, shaping, or selecting appropriate responses,
(e) in order to achieve a sustainable common good.

Furthermore, coaching to elicit wisdom resources directs the attention of the client to the processes of discernment, decision making, and action, while facilitating reflection and insight through experience, feedback, and evaluation (see Figure 9.3).

The next steps in my research are to assess wisdom-performance before and after coaching and against matched controls using a person-centred instrument such as Ardelt's (2003) 3D-WS together with more open-ended approaches as suggested by Kunzmann and Stange (2007). Contrary to Kilburg (2006) I believe wisdom resources reside in all of us to a greater or lesser degree. We resort to our own 'wisdom compass' to address the difficult and ambiguous life decisions for which there are no

Figure 9.3 A wisdom compass.
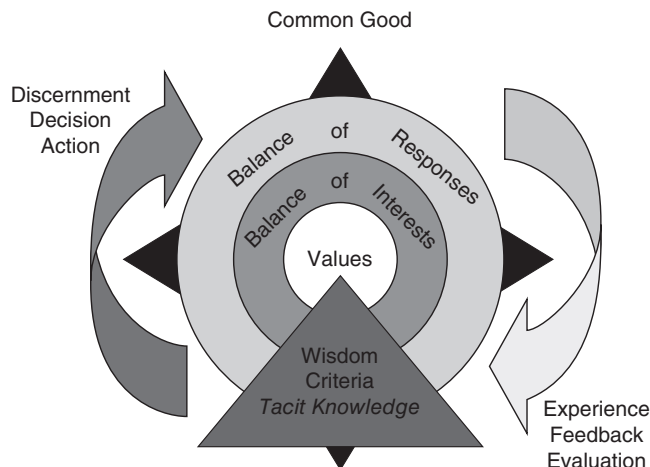
right answers. In this way, wisdom might be perceived as another kind of strategic decision-making tool, yet with far greater depth, range and meaning for positive human relationships within sustainable organizations. Asking the right questions at the right time can trigger the client's latent wisdom resources. This demands of coaches to both deliberately foster wise responses in their clients and to be wise themselves!

Ultimately, I believe the highest purpose for coaching in troubled times must be to make the leader's implicit wisdom resources more explicit and to help them shape those resources into a personal 'compass' to make wise decisions in the service of a common good. The emerging field of wisdom in psychology suggests ways in which coaches can rise to that challenge. Our planetary survival may very well depend on it.

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