

Book Review

Leadership Agility: Five Levels of Mastery for Anticipating and Initiating Change

Bill Joiner & Stephen Josephs. 2007. San Francisco: Jossey-Bass

Reviewed by Jonathan Reams

There it is, right on the first page of the introduction in big letters – “An Integral Approach.” For those of us who have been engaged in learning about and trying to make use of the integral paradigm for a while this phrase can be loaded with expectations. Will this book make it into the mainstream of the field (leadership development) or will the integral message be marginalized and relegated to a few devotees? Will it stay true to our particular conception of integral, or will it frame integral in its own way? These and a host of other questions could arise from reading through the beginning of Joiner and Josephs’ book.

For me, an added allure of the book is that it is in my field of study, leadership. Being familiar with many of the challenges present in attempting to bring new and useful distinctions to the discourse in the field, I was curious to see if Joiner and Josephs could do something beyond what was already present in the literature. I was also curious to see if they could communicate an integral approach to leadership development in a clear and accessible way.

On almost all accounts, I found that the authors succeeded in meeting the challenge. Their book is clearly written, well organized, and full of useful stories that illustrate the distinctions they make. It is the distinctions they make and how they organize them that make the book work so well. The structure they provide guides the reader through the five levels of mastery they delineate in a way that makes very clear how each level grows from the previous ones. The big question introduced at the beginning is, Is the approach integral? My view is yes, and this review intends to show why, as well as point to a couple of weaker areas.

What they say

To begin, one of the ever-present issues I encounter when providing authors feedback on their submissions is the need for more context setting. Situating the readers is critical if you wish to have them on the same page with you as you take them on the journey you wish to describe. Joiner and Josephs do this very well. Their introduction clearly sets the stage for what is to come by framing the approach they take, describing some of the journey they took to get there, and being explicit about how to make best use of the sections of the book. They lay out how they see an integral approach by saying that they approach the stages or levels of leadership agility development from both the outside in and the inside out. The outside in involves skill development, focused on three areas: pivotal conversations, team initiatives and organizational initiatives. The inside out involves mental and emotional capacities that enable the above mentioned skills to develop. With these simple distinctions they define the integral territory they will cover.

Then, in part one they define and illustrate the core competency of leadership agility upon which they base the book. This first pass through the territory does three key things. First, it situates leadership agility in the context of the ever-increasing complexity of the situations leaders encounter in organizations. It briefly describes the five levels of leadership agility; expert, achiever, catalyst, co-creator and synergist. Second, they tell one story, about Ed, a composite character who responds to a situation in five different ways, each illustrating one of the levels of leadership agility. Third, they lay out four core competencies that further define leadership agility. The four are: context-setting agility, stakeholder agility, creative agility, and self-leadership agility. Two capacities comprise each core competency. For context setting agility, they are situational awareness and sense of purpose. For stakeholder agility, they are stakeholder understanding and power style. For creative agility, they are connective awareness and reflective judgment. For self-leadership agility, they are self-awareness and developmental motivation. Finally, they show how each level is undergirded by awareness and intent.

The second part of the book devotes one full chapter to each of the five levels of leadership agility. This is the meat of the book, where the authors go into depth to show the nuances, differences and distinctions present at each level. Each chapter uses three or more case studies to illustrate the various aspects of leadership agility at each level. Each chapter is structured in a similar manner, showing what leadership means to people operating at that level, how they perform in the three areas of pivotal conversations, team leadership and organizational leadership. Then they go into how these cases illustrate the eight capacities forming the four competencies at each level.

The third section of the book discusses how to apply all of this in becoming a more agile leader. A chapter on assessing leadership agility is followed by one on developing it. This is initially done through a set of answers to frequently asked questions about their model, then shifts to describing aspects of growing into a new level of agility, straddling between two levels, and issues of downshifting. They briefly describe to individual readers how to assess their own current level; an example helps to illustrate how to do this. The second chapter in this section discusses how readers might set developmental goals, both within their current level of agility and in developing a new level. This is illustrated by weaving a story through the discussion, which focuses on the power of reflective action. It closes with an analysis of how this story relates to the levels of awareness and intent at the core of the process, and a further story of the power of attentional practice.

Kudos and questions

I was quite impressed with the ability of Joiner and Josephs to so clearly communicate the often-times challenging complexities of understanding developmental stages. I have come to appreciate the ability to make distinctions. There are many to make, and ones that sometimes matter most are often those that are the hardest to convey. Joiner and Josephs make clear and easy work of it. I believe this competency is one of the chief gifts of the book and one that will make the book particularly useful to its readers.

The manner in which they tease out how the different levels function has a simple clarity to it that comes only from long experience. This shows up in the seamless integration of a coherent organizational structure of the contents, in the presentations of the various aspects of leadership agility, in the selection and explication of core competencies, and in the way the stories bring the distinctions to life. I came away thinking that readers' chief benefit may be in not needing to sift

through unnecessary verbiage, or possess prior subject knowledge to mine the gems in this book. All of these factors lead me to judge the book's approach to be integral in presentation, content and organization—all without reliance upon jargon or any particular model's terminology.

A minor point triggered my attention as I read through the book, and one deeper concern arose. The minor point arose in relation to their claim about Jim Collin's level five leadership. In their very first footnote, they make a distinction between Collins use of the term "level five leader" and their use of level five leadership, saying that their analysis shows it to be only at their achiever level. On page 77, they point to how a leader using achiever level agility was a level five leader in Collin's terms. I am going on second hand knowledge here, but it felt to me that Joiner and Joseph's analysis might have devalued Collin's work in this area (and I regret not having the time to check into this).

A larger issue for me was the third section of the book. After being very pleased with the way the first two sections did their jobs, I expected to find similar clarity and structure to facilitate my self-assessment and development of leadership agility in the third section. The further I read in its two chapters, the more I came away feeling that I was much more left on my own to sort things out. I began to wonder how other readers might sort out their self-assessment from the answers to frequently asked questions and the stories that comprised the bulk of that chapter. The next one on developing leadership agility left me feeling much the same.

Upon reflection, I wonder if here, at the stage where so much energy and effort had gone into creating a clearly communicated and well-structured set of distinctions in the previous sections, the authors could not find an equally elegant way to address the even more complex and thorny question of how to guide a reader through a self-assessment. While I could sort out things for myself, I recognized that previous familiarity with these models gave me an advantage that many readers might not have. From this third section, I came away with the critique that Joiner and Josephs had not mustered the same accessible clarity achieved in the first sections of the book. The work's only weakness seems to be in helping others apply it for themselves.

In the end, I did not feel that this gap in the last section detracted enough from the book to dampen my enthusiasm for what the authors have managed to accomplish. This book can provide leaders and those who wish to be leaders with tremendous tools to enhance and grow in their agility as leaders.