

Digital Orientation for Life Choices: Introducing StoryMatcher

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Summary

In this paper I outline the path to a novel approach to survey people for their meaning making. Individuals are prompted to choose stories or short scenarios they can identify with as a desired future.

While my initial concern when inventing the instrument, called StoryMatcher, had been to create a match between jobs and candidates, it seems the StoryMatcher system might as well serve to find connections with people in general as it brings people together who have similar stories about their desired future in common.

During a three-year long development project “Cognitive adult development – from research to application” (CADRA), which was funded through the EU program ERASMUS+, I, together with a wider team from all CADRA partners, could build a set of scenarios and interpret those with the insights from Robert Kegan’s framework of adult development. We could compare some subject-object interview analysis with the Kegan interpretations of the StoryMatcher selections done by the same individuals.

The very initial findings did not contradict our development hypothesis that StoryMatcher could give an indication of an individual's meaning making similar to how Kegan's subject object measure does.

I assume that other interpretative systems could equally be assessed through scenarios.

I therefore present our approach here as an invitation for practitioners and scholars to engage with us for further research and developing the instruments further, be it around the analysis of adult development or around other constructs that aim to understand humans from within.

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The StoryMatcher Concept and History

Origin and Impetus of the StoryMatcher Approach

I was in charge of defining the user requirements for a personnel portal in European Institutions in the early 2000s. My primary task was to model staff movements between jobs. While researching portals for recruitment, I found that there were no matching functions that could bring people together according to their future, or exploring their “calling” or “aspirations.” Instead, most recruitment selections use data only from the past. To fill this critical gap, I developed a digital matching process that could be used across industries to find critical talent that fits the specific workplace culture and the often implicit expectations from managers, colleagues or clients. People should find a place at work, where who they want to be is also wanted by most of the people they work with every day.

The same principle can apply to learning opportunities or the search for new friends and life partners.

As an experienced career coach, I was accustomed to individuals searching for career guidance. One of the most common issues my clients expressed was related to a discontinuity between their aspirations and their current place of employment. For example, a common question I would receive was “I’m no longer happy working here, where should I apply now?” Recognizing this common pattern, I began encouraging my clients to reflect on a moment in their current work where they felt unusually successful. Based on the stories they shared, my clients could quickly be helped and effectively understand how the strengths and motivations demonstrated in this story could be of good use in other workplaces, where the individual could then go to apply for their next job.

This work with “critical success incidents” inspired me to create a digital system to help individuals navigate career changes within their organisation. As a first project, I brought together a small research team from European institutions in Brussels to explore various conceptions of success in these diverse work environments. After listening to more than 50 individuals sharing an important moment of their professional life, the EU team summarised and thematically coded the anonymised stories into a collection of possible success experiences in the EU institutions. This was the first story set summarising the work culture of an organisation done with this method. Since this first project, I continued to collect stories, in which staff from various companies and organisations express their successes, desired futures or aspirations. The stories are kept in an anonymised StoryMatcher database with hundreds of success moments from real life.

For the interpretation of user choices from sets of stories, soon a meta-orientation was required to be able to compare different scenarios, according to similar patterns or traits. Those pattern similarities can be understood through the help of meta frameworks, such as adult development.

Through extensive testing, I found that the stories collected could be effectively analysed and thematically grouped within the development hierarchy developed by Robert Kegan. The StoryMatcher framework is the first model of its kind to use stories as a developmental mapping and matching tool and that can link people in real time based on the scenarios they selected.

Through meta-coding the scenarios provide a score in the Kegan framework, which in turn allows to match people to other people or to content like job opportunities, independent of the specific choice of scenarios made. As a result, people regularly find matches that make meaning for them.

Purpose

The motivation behind this development was to offer to more and more people a continuously meaningful experience in their work life, and in their life in general. Once a work role begins to lose its depth, not least because the individual in the role has learned what they could learn in it, it is time to explore new roles rather than get bored in the existing function. Equally, organisations get the best return from their members when they are highly motivated and challenged, learn and develop on their tasks. This gives the reason why organisations would offer their staff continuously new opportunities of work and engagement.

This is inspired by Otto Laske's theory of work, which was in turn inspired by Elliott Jacques' career path studies.

Developments Through the CADRA Project (2020-2023)

As part of the CADRA project – “Cognitive Adult Development, from Research to Application,” a team was investigating how and if StoryMatcher could be used as an online assessment tool to give an indication of a person's maturity of meaning making. So rather than using the Kegan score implicitly as a proxy for matching content or people with each other, our question was if this score could also be seen as a proxy for the individual's position in their journey of adult development?

Supported by ERASMUS+ funding, the CADRA team learned to facilitate and host story listening circles to elicit fresh incidents of success from a variety of individuals across Europe. A dedicated set of scenarios (stories) was curated from these gatherings. Using Kegan's developmental framework, each of the unique scenarios were analysed and meta-scored.

While this was feeding a new database with real-life content from many sources, we also partnered with the social platform shala.us to develop applications of StoryMatcher for various uses.

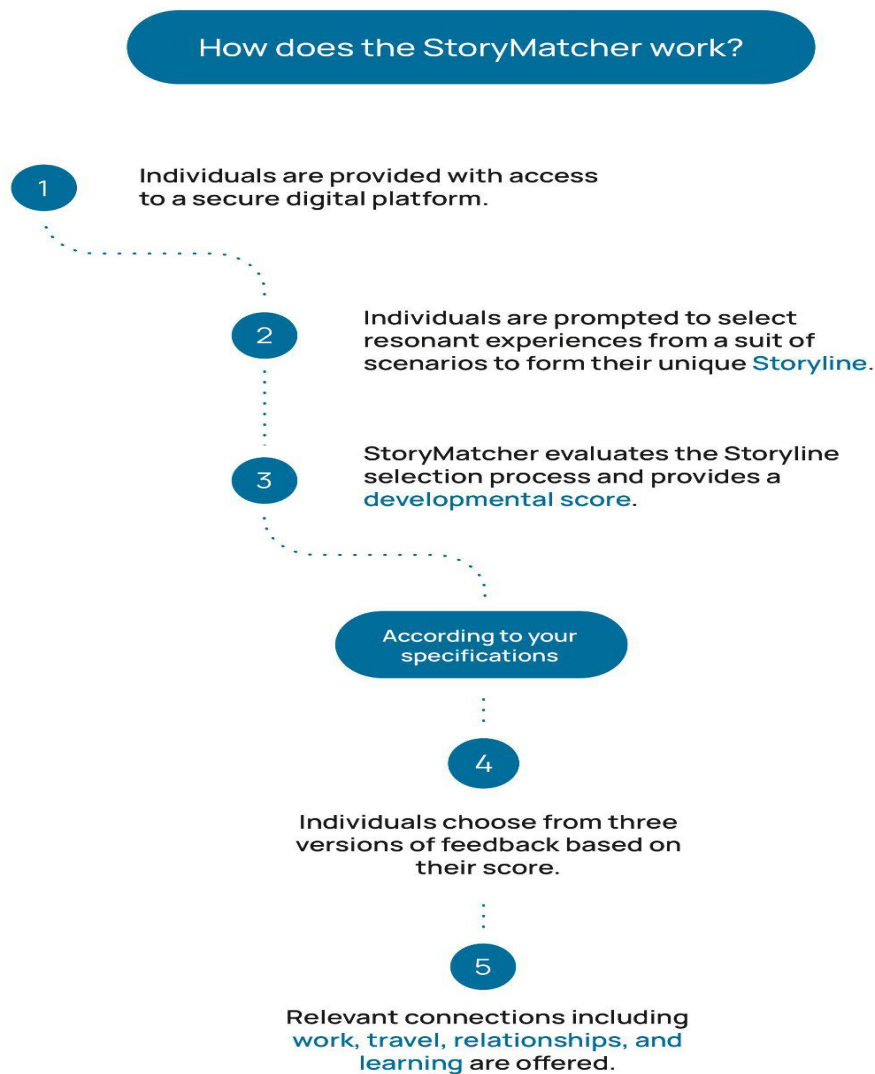
Shala is an organisation with the aim to offer anyone the building elements for creating their own social platform, while sharing services and functions with other platforms. StoryMatcher is one of those services all platforms in Shala can use for their specific purposes.

During the CADRA project we mainly built a self-assessment function, where people can receive feedback about their own meaning making at work. I describe this in more detail below.

In the field of adult learning, our team intends to build a developmental learning platform with a learning cohort of Ukrainian social entrepreneurs. Features of this platform would include these services based on the developmental interpretation of their scenarios:

- Individuals do their self-assessment and receive immediate feedback;
- Individuals are linked to learning opportunities according to their individual development situation;
- Learning providers who design curricula do this according to specific capabilities present at given developmental positions;
- Learning providers can select participants based on developmental ranges and;
- Facilitators can develop learning cohorts that have similar development capacities. As a consequence, the design and delivery of learning programs can fully work with these capacities.

How it Works – the CADRA StoryMatcher



1. Individuals are provided with access to a secure digital platform.
2. Once logged in, individuals are provided with a suite of scenarios addressing topics such as success at work. Here they select those scenarios which they resonate with most closely. They can associate with a scenario in three ways:
 - A. I have done this in the past, but it is not of interest to me anymore.
 - B. I do this and want to do more of this.
 - C. This is now for me and highly attractive. I want to live this in my future.

If there is no association, they go on reading another scenario.

They choose a total of 4-7 scenarios out of a catalogue of 50 options, which together creates their storyline.

3. Once the individual has completed their story selection, the interpretation of the selection is calculated in the background from the meta-scores of each selected scenario.
4. The individual receives results from their Storyline. In the CADRA StoryMatcher, participants are offered three versions of feedback about the success strategies they prefer and are invited to select the report they feel most accurately captures their experience. The three report versions are descriptions of how one would make meaning, each at a given position of the Kegan framework. We offer the three reports that are closest to the calculated Kegan level from the scenario selections. The user chooses the report they feel most “correct” for them, or could report to us that none of those would make sense. We offer this choice of reports to incite the users to “own” the findings more as they choose them, and to be able to compare the user selection with the report the system would have set from the scenario calculation.

We recommend users to debrief the reports with their coach or a friend.

3. Research Background in the Development of StoryMatcher

3.1 Drawing on Adult Developmental Methods

We currently use as main meta-framework to compare scenarios and to interpret scenario selections the framework developed by Robert Kegan, and there especially the practice of analysing interview texts from Subject-Object interviews in the version of Otto Laske (2011).

Kegan’s model proposes the following five distinct development stages:

Stage 1: Impulsive Mind

Stage 2: Instrumental Mind

Stage 3: Socialised Mind

Stage 4: Self-Authoring Mind

Stage 5: Self-Transforming Mind

Between each of these stages are transitional phases – liminal spaces where the mind is influenced by both the stage before and the stage after. It is a life movement, the mind's processing of contradicting information and tendencies that is behind the gradual, sometimes dramatic shift in worldview and perceptions. For the purpose of measuring where an individual is situated developmentally, one needs to know the interim positions as orientation points as much as the main stages outlined above.

The five cognitive stages have been thoroughly analysed for approximately 50 years (Bauger et al., 2020). Kegan's approach is widely recognised as an effective approach for assessing change processes in adult development. Since individuals express their meaning making processes through dialogue, analysing thought patterns is an effective way to identify an individual's development stage.

3.2 StoryMatcher Compared with the Subject-Object Interview

Kegan, together colleagues from Harvard University developed a prompted interview methodological protocol called the Subject-Object Interview (Lahey et al., 2011). This method builds off decades of adult developmental research since the 1980s to-date, and was further refined by Otto Laske (Laske, 2011). Benefits of the Subject-Object Interview process include:

1. **Accuracy:** Through prompting many aspects related to the internal meaning-making process in the individual, a broad sample builds up, which a skilled analyst can interpret according to the orders of mind described above.
2. **Timeliness:** The interview is facilitated by a trained interviewer who prompts the individual to generate timely reflections and interpretations of their inner meaning-making process.

While the Subject-Object interview method is very accurate in its observations, it has a number of disadvantages including:

1. It takes a well-trained interviewer to actually conduct the interview and lead the dialogue so that meaningful text is produced.
2. The analysis of the text also requires well-trained practitioners who can discern the patterns of meaning-making according to the fine micro stages mentioned above.
3. Those two factors not only make the profiles expensive to operate, they also prevent this measure from being used in large scales.

Where developmental measures differ from other assessment models is that they are not designed to define the character or personality “type” of a person. StoryMatcher asks individuals to identify (with) their preferred success strategies. These success strategies include their aspirations, meaning making processes, and how they relate to others as well as themselves. StoryMatcher uses the same scaffolding as Kegan's development model, mapping how the mind relates to others and Self, across a spectrum of adult development.

One of the benefits of StoryMatcher is that it is highly accessible. Consequently, individuals can go through the program as many times as they wish to examine how their meaning-making and inner transformation evolves over time.

In a StoryMatcher platform, individuals are offered a selection of choices from condensed scenarios based on real life narrations. Each of these scenarios corresponds to responses prompted in a Subject-Object interview. These scenarios are purposefully rich in context and can therefore be interpreted through various lenses also beyond adult cognitive development.

This is so that StoryMatcher evokes a full experience in the test person who is invited to “identify” with the hero in the story. By doing so, the individual signs up for a whole bundle of traits rather than showing specific competencies or behaviour traits in isolation. From this approach to involve the whole self of the person, a variety of interpretations are possibly derived from the same dataset. Currently, StoryMatcher is programmed to perform algorithmic sensemaking via Kegan’s scale of adult development. However, we see the potential to include other meaning making interpretations and are currently exploring their integration.

This process is distinct from most psychometric tests that are constructed to measure a specific trait or model in an isolated fashion to ensure the specific quality is present or actualized by the individual. Instead, we take a more complexity-informed approach to data collection. We are evaluating the scenario and give a weight to the individual qualities we want to measure. Unlike the Kegan scoring that selects specific micro levels per bits of text, our approach is calibrates micro-scores and distributes them across a spectrum that is covered in a given success scenario.

The sum, of all values from all selected scenarios together informs a proxy value for the maturity level we want to measure.

StoryMatcher, much like the Kegan Subject-Object interview process, requires a trained specialist to make sense of the meaning making process as it is demonstrated in text. The difference is that this specialist input is needed only at the moment the scenarios themselves are constructed. After this, the interpretation per individual can be calculated by a computer, building on the values the expert humans have attributed to the selected scenarios in advance.

The benefits of this approach for quantifying levels of adult cognitive development over other models includes the following:

- Developmental data can be collected without the need for an interview;
- Results of the survey are kept confidential throughout the duration of the entire process;
- Results from the survey are automatically calculated without the need for extensive linguistic analysis;
- This process offers an accurate and low-cost method to accurately assess adult development at scale; and
- So finally, the developmental measures can scale, at a low marginal cost.

Disadvantages are present as well.

- As any computer-human interface, it lacks the personal contact and touch of a real interview and dialogue.
- One can never be sure about individuals attempts to “fake” the results by pretending a Self they actually don’t have so much.
- The measures derived from a holistic story set are likely to be less precise than those derived from specialised tests.
- Taking all this into account, the use of StoryMatcher results cannot replace sound human judgement.

We therefore see the main use of StoryMatcher to serve as a matching tool, where a proxy result of adult development is better than none, or the cost of more accuracy would not be in proportion to the benefits of it. As such, there are many generative areas of application for the StoryMatcher program, especially when the goal is not mainly to “assess” the individual, but rather to offer the person a selection of “meaningful” or “relevant” human connections as well as opportunities for transformative growth or learning.

Concluding Remarks

This article introduces the StoryMatcher concept from its initial invention to its current state as a fledgling service for social platforms.

We present this approach with the aim to invite independent studies on the assessment of adult development with StoryMatcher so one could use a StoryMatcher test as a valid complement or sometimes alternative to the Subject-Object interview.

We are seeking partnerships as well to see how other interpretative systems could result from scenario selections.

Finally, I look much forward to your comments and suggestions from your reading this.

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