

# TOWARDS REBIRTH IN ORGANISATIONAL CHANGE AND DEVELOPMENT

## A SOUTHERN VOICE

Ntombana Del (Mamohau) Sekgaphane

Student number: 6861

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Academic supervisor: RC Viljoen, DBL

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## **DECLARATION OF AUTHENTICITY**

I declare that the research project, Towards REBIRTH in Organisational Change and Development – A Southern Voice, is my own work and that each source of information used has been acknowledged by means of a complete reference. This thesis has not been submitted towards another research project, degree or examination at any university.

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Ntombana Del Sekgaphane

19 September 2018

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## Table of Contents

DECLARATION OF AUTHENTICITY .....	i
DA VINCI COPYRIGHT INFORMATION .....	ii
ACKNOWLEDGEMENTS .....	iii
GLOSSARY OF KEY TERMS .....	xii
ACRONYMS	xix
PREFACE	xxi
ABSTRACT	xxvi
CHAPTER 1: An Introduction to the 4C Integral Journey and its GENE elements	1
1.1 Introduction .....	1
1.2 Rebirth conceptualised .....	2
1.2.1 Rebirth.....	2
1.2.2 Rebirth (rebirth) transformation journey .....	2
1.2.3 REBIRTH.....	3
1.3 Integral Research Approach (IRA) .....	3
1.4 Key Concepts .....	4
1.4.1 Rebirth (rebirth) .....	4
1.4.2 Organisational Change and Development (OCD).....	5
1.4.3 Transformation.....	6
1.4.4 Inclusivity.....	6
1.4.5 Human aspects used in the thesis.....	6
1.5 Research questions .....	8
1.6 Research objectives.....	9
1.7 The participatory action research (PAR) team .....	9
1.8 The 4Cs of integral research within the thesis.....	10
CHAPTER 2: My Story – grounding to Call, invoking a Rebirth conception	13
2.1 Introduction .....	13
2.2 My personal journey grounding to Call.....	14
2.3 Interpretation of the painting and artwork – the Rebirth mandala .....	15
2.4 Envisioning the Rebirth journey - the integral experience and ontological scaffolding of the painting	17
2.5 The significance of the Rebirth journey and building the ontological argument .....	17
2.6 The Rebirth transformation journey and I as organisational change and development practitioner and rebirth matriarch within the FNB case.....	18
2.7 My story – Grounding to Call and invoking a rebirth conception .....	21

2.7.1	Envisioning Rebirth through family and lineage .....	23
2.8	Envisioning the 4C Integral journey within the Southern tribal circle .....	26
2.9	Conclusion .....	27
CHAPTER 3: The story of my culture, emergence and Context		28
3.1	Introduction .....	28
3.2	The story of my culture as seen through the lens of the rebirth tribal circle .....	28
3.3	Unpacking Botho-Ubuntu – a Southern philosophy and basis of my culture .....	31
3.4	My Zulu cultural heritage, its symbols as a conduit towards communal cultural identity and grounding to Call .....	32
3.5	My Setswana cultural heritage and its symbols as a conduit towards communal cultural identity and grounding to Call .....	37
3.6	Conclusion .....	40
CHAPTER 4: The story of FNB Private Wealth Client-Servicing, its culture and burning issue –Context		42
4.1	Introduction .....	42
4.2	Background.....	42
4.2.1	Origins of FirstRand .....	42
4.2.2	Business objective .....	43
4.2.3	Contextualising the challenges for FNB Private Wealth Client-Servicing .....	47
4.2.4	Contextualising the people challenges .....	49
4.3	Lack of innovation thinking .....	51
4.4	Lack of Investment in building the unit.....	52
4.5	Consequences – the burning issue or business problem .....	53
4.5.1	People Pillar Engagement Survey.....	53
4.5.2	Fraud risk.....	54
4.5.3	Moving from client channel to operating centre .....	55
4.5.4	Service levels and ethos .....	56
4.5.5	Lack of skills and development contributing to high staff turnover .....	59
4.5.6	Lack of accountability on the job leading to increased disciplinary actions .....	60
4.6	New business strategy .....	60
4.7	The need for innovation .....	62
4.8	Conclusion .....	62
Chapter 5: The Story of Communities of Practice (CoPs) and its relevance as new people form within the case organisation FNB Private Wealth Client Servicing – Co-creation		64
5.1	Introduction .....	64

5.2	Background on introducing a new people form within FNB Private Wealth Client-Servicing	64
5.3	People as one of FNB’s Strategic Pillars towards 2025 and the need to establish an inclusive people form to unlock greater business value.....	65
5.4	Communities of Practice as strategic driver for today’s knowledge economy.....	65
5.5	CoPs as a relevant organisational form for driving learning and innovation within FNB Private Wealth Client-Servicing .....	69
5.6	CoPs as an organisational form to re-awaken innovation consciousness through engaging the Southern norm of Botho-Ubuntu.....	69
5.7	The perceived value of CoPs within FNB Private Wealth Client-Servicing.....	70
5.8	How Communities of Practice were selected and organised within the FNB Private Wealth Client-Servicing context.....	71
5.9	Conclusion .....	72
CHAPTER 6: Integral Research Approach (Methodology and research design)		73
6.1	Introduction .....	73
6.2	Research paradigm.....	73
6.3	Ontology.....	74
6.4	Epistemology.....	74
6.5	Methodological assumptions .....	76
6.6	Integral Research Approach .....	77
6.7	Qualitative research .....	77
6.8	PAR as a method .....	78
6.9	Research Path.....	79
6.9.1	The Integral Research Approach and path.....	79
6.9.2	GENE.....	79
6.10	Research design.....	84
6.10.1	Four worlds and four human modes – an integral design .....	85
6.11	Sampling.....	86
6.12	Data-gathering .....	86
6.12.1	Pre-intervention investigation .....	88
6.12.2	Pre-post intervention analysis .....	89
6.13	Data analysis.....	98
6.13.1	Step 1: Organising data .....	98
6.13.2	Step 2: Description .....	98
6.13.3	Step 3: Interpretation.....	99

6.14	Triangulation .....	99
6.15	Delimitation of PAR using IRA .....	100
6.16	Quality criteria.....	100
6.17	Ethical considerations .....	102
6.18	Conclusion .....	103
CHAPTER 7: Effecting rebirth - Intervention		104
7.1	Introduction .....	104
7.2	Method of case analysis.....	104
7.3	Systems pathway for rebirth.....	105
7.4	Desired end state for FNB Private Wealth Client-Servicing .....	110
7.4.1	The main drivers of the rebirth transformation journey .....	112
7.4.2	Causal diagram outcomes .....	112
7.5	Why rebirth as a transformational journey?.....	113
7.6	Introducing the REBIRTH framework as Southern transformation and inclusive solution	114
7.7	Constructs used in rebirth.....	117
7.8	The use and meaning of symbols in the rebirth transformation journey.....	118
7.9	Rebirth objectives .....	119
7.10	Organisational culture.....	121
7.11	Rebirth transformation journey .....	123
7.11.1	Dance.....	123
7.11.2	Industrial theatre and use of archetypes .....	125
7.11.3	Song.....	125
7.11.4	Colour .....	125
7.11.5	Dialogue .....	126
7.11.6	Story-telling .....	127
7.11.7	Rebirth (rebirth) CoP workshop Day 1 .....	128
7.11.8	Rebirth (rebirth) CoP workshop Day 2 .....	131
7.11.9	Rebirth (rebirth) CoP workshop Day 3 .....	135
7.12	The dynamics of rebirth relationships .....	136
7.13	Engaging the rebirth transformation journey .....	137
7.14	A Southern leadership perspective to manage people more effectively – The rebirth transformation journey.....	139
7.15	Leading people within FNB Private Wealth Client-Servicing.....	140

7.16	What rebirth seeks to promotes .....	142
7.17	The rebirth transformation journey equips leaders to deal with conflicting situations	143
7.18	Formalising organisational change and development connection strategy through rebirth	144
7.19	Spiral Dynamics as an essential archetype within the rebirth transformation journey	145
7.20	Contextualising archetypes .....	148
7.20.1	Using archetypes to manage conflict in rebirth .....	149
7.21	Leadership and Resilience .....	150
7.21.1	Engaging the rebirth transformation journey in building resilience and creative leadership	150
7.22	The nature of rebirth and resilience in the workplace .....	151
7.23	Conclusion .....	153
CHAPTER 8: Participative Observations and Collective CoP Voices in rebirth		154
8.1	Introduction .....	154
8.2	Contextualising FNB Private Wealth Client-Servicing and its challenges within the FNB case	155
8.3	Research data-gathering, participative observations and collective voices .....	155
8.4	Research observation report: pre-, during and post-rebirth .....	156
8.4.1	Strategy and Vision.....	156
8.4.2	Driving organisational learning through rebirth and active CoP engagement: Pre-and Post	157
8.4.3	Innovations: Pre-and Post .....	158
8.4.4	People.....	158
8.4.5	Leadership .....	160
8.4.6	Levels of Engagement .....	161
8.4.7	Customer Engagement.....	161
8.5	Reflections on rebirth and its impact .....	162
8.6	Conclusion .....	163
CHAPTER 9: Results, findings and recommendations – FNB Private Wealth Client-Servicing vision to rebirth and client-servicing philosophy		164
9.1	Introduction .....	164
9.2	Community of practice.....	165
9.3	PAR .....	165

9.4	Key themes that emerged from data gathered in the rebirth transformation journey	166
9.5	Supporting themes that emerged from data gathered in the rebirth transformation journey	166
9.6	Post-intervention analysis.....	168
9.6.1	The process of post-intervention investigation .....	168
9.6.2	Analysis of approach through rebirth .....	169
9.6.3	Increase in staff retention and morale.....	169
9.6.4	People Churn (Staff Turnover) .....	171
9.6.5	Increase in innovations through rebirth .....	173
9.6.6	Improvement in engagement survey outputs .....	174
9.6.7	Trends in client service delivery .....	176
9.6.8	Complaints and Compliments .....	180
9.6.9	Increase in servicing ethos .....	181
9.7	Sustainable technological and innovation competencies and key recommendations	183
9.8	Policy recommendations to embed the rebirth transformation journey, drive inclusive transformation and a new servicing culture.....	185
9.8.1	Policy Recommendation 1: Technology promotes key tactics for distributing increased customer capacity within FNB Private Wealth Client-Servicing.....	185
9.8.2	Policy Recommendation 2: Formalising technological custodianship through new competencies	185
9.8.3	Policy Recommendation 3 – An innovative culture for resilient leadership to drive the CRSMP technological system.....	186
9.9	Conclusion .....	187
CHAPTER 10: Contribution – A full view of the thesis through the 4C integral journey		188
10.1	Introduction .....	188
10.2	The integral journey .....	190
10.3	Integral Research Approach (IRA) .....	191
10.4	My Motivation in engaging the integral methodology of IRA.....	191
10.5	The Southern worldview and grounding to our humanness .....	192
10.6	The adapted REBIRTH framework as new science and Southern contribution .....	192
10.6.1	Positioning the rebirth integral framework .....	192
10.7	Themes that emerged through engaging the rebirth transformation journey .....	194
10.8	Summary of the key findings and recommendations to achieve the FNB 2025 vision within FNB Private Wealth Client-Servicing.....	195

10.8.1	The following recommendations are made: .....	195
10.9	Contribution of REBIRTH and the rebirth transformation journey to drive inclusive transformation in today’s complex organisational landscape.....	196
10.9.1	Addressing research questions and objectives .....	197
10.9.2	In answering these questions, I also set out the aim and unique contribution of this thesis in the field of study as follows:.....	200
10.10	The Challenge and Complexity of organisations requires integral transformation..	202
10.10.1	A Southern leadership perspective to manage people more effectively – The rebirth transformation journey.....	204
10.10.2	Leading of people .....	205
10.10.3	Organisational culture as a critical tenant within rebirth .....	207
10.10.4	Delimitations of the Study.....	208
10.10.5	Quality criteria.....	210
10.10.6	Ethical Considerations.....	211
10.11	Conclusion .....	211
References		215
Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012).....		229
Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)		230
Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)		231
Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)		232
Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)		233
Appendix B: Solicited data (In-Depth interviews).....		234
Appendix B: Solicited data (In-Depth interviews) – (continued) .....		235
Appendix C: Rebirth transformation journey focus group planning schedule– Phase 1 and 2.....		236
Appendix C – (continued).....		237
Appendix C – (continued).....		238
Appendix C – (continued).....		239
Appendix C – (continued).....		240
Appendix C – (continued).....		241
Appendix C – (continued).....		242
Appendix C – (continued).....		243
Appendix D: FNB Premium Client-Servicing – Rebirth and Innovation Diagnostic.....		244

Appendix E: Personal innovation profile for FNB Private Wealth Client Servicing – Thulisile Lushaba  
251

Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing - Thulisile Lushaba .....	254
Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing Thulisile Lushaba .....	256
Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing - Thulisile Lushaba .....	257
Appendix F: Archetypes in the FNB cross generation Case Study in the womb of rebirth.....	258
Appendix F – (continued) Archetypes in the FNB cross generation Case Study in the womb of rebirth – (continued) 259	
Appendix G: rebirth workshop plan and communication .....	260
Table G.1. CoPs created by researcher .....	260
Table G.2. Researcher’s rebirth workshop CoP timeline (June 2014) .....	260
Appendix G – Continued .....	261
Appendix G – Continued .....	262
Appendix H: Business Plan for CoP 3 – The Adaptables (2014) .....	264
Appendix H: Business Plan for CoP 3 – The Adaptables (2014) – (continued) .....	265
Appendix H: Business Plan for CoP 3 – The Adaptables (2014) – (continued) .....	266
Appendix H: Business Plan for CoP 3 – The Adaptables (2014) – (continued) .....	267
Appendix H: Business Plan for CoP 3 – The Adaptables (2014) – (continued) .....	268
Appendix I: Rudi van den Berg Daily Journal (CoP).....	269

## GLOSSARY OF KEY TERMS

<b>Abandoned calls:</b>	Inbound calls that are ended prior to being answered – client hangs up.
<b>Afrika:</b>	An Afrikaans word for the African continent.
<b>Afrikaans:</b>	An official South African Language similar to West German which dominated South Africa during apartheid.
<b>Apartheid legislation:</b>	Legislation enacted during 1948-1994 designed to separate people along racial lines giving illegitimate rights and power to minority Afrikaans or the so-called white minority and marginalising all other groups.
<b>Archetype:</b>	<p>“A kind of readiness to produce over and over again the same or similar mythical idea.”</p> <p>“Archetypes are ‘pre-existent form [s]’ (Jung,1953: 6, par. 89), ‘true and genuine symbols that cannot be exhaustively interpreted, either as signs or as allegories’ (Jung, 1953: 8, par. 80); ‘It seems to me that their origin can only be explained by assuming them to be deposits of the constantly repeated experiences of humanity. The archetype is a kind of readiness to produce over and over again the same or similar mythical idea”, Jung (1953:109).</p>
<b>Autopoiesis:</b>	Refers to a system capable of reproducing and maintaining itself (Maturana, 1980).
<b>Auto-ethnography:</b>	Laubscher (2013:8) defines auto-ethnography as a form of self-reflection and writing (autobiography) in which the researcher writes about his or her personal experience connecting these experiences to the greater cultural, social and political meanings and understandings in relation to other in society.
<b>Bantu Education:</b>	An education system taught to so-called black South Africans during apartheid.
<b>Batswana:</b>	A Bantu tribe closely related to seSotho originating from Bophuthatswana, as well as neighbouring areas of the North-West Province and the Northern Cape.
<b>Boa me na me mmoa wo:</b>	A Ghanaian Adinkra symbol meaning: help me and let me help you.
<b>Body quotient (BQ) health quotient (HQ):</b>	The level of respect for self, other and human dignity (Lessem, 2001:12) within which the health quotient (HQ) as the level of harnessing of holistic health and well-being in human beings spirals out.

<b>Botho-Ubuntu:</b>	A quality that includes the essential human virtues; compassion and humanity (Mbigi & Maree, 1994).
<b>Call:</b>	Southern sphere, grounding and the relational path (Lessem & Schieffer, 2009).
<b>Co-creation:</b>	Northern sphere, navigation (Lessem & Schieffer, 2009).
<b>Context:</b>	Eastern sphere, emergence (Lessem & Schieffer, 2009).
<b>Contribution:</b>	Western sphere, effecting (Lessem & Schieffer, 2009).
<b>Client:</b>	FNB Private Wealth client who meets the minimum criterion of an income of R1.5 million per annum or one that receives professional service at a cost.
<b>Clout:</b>	Refers to power and domination.
<b>Community:</b>	A group of persons with a common goal in Africa.
<b>Community of Leaders (CoL):</b>	The drivers of communities towards a common goal.
<b>Community of Experts (CoE):</b>	A community of persons who are experts/elders in the greater community of practice
<b>Community of Mixes (CoM):</b>	A community of persons consisting of various members from CoPs, CoEs, CoLs.
<b>Community of Practice (CoP):</b>	A group of people who share a craft and or profession.
<b>Competitors (FNB):</b>	The four big banks in South Africa being, Standard Bank, ABSA, Nedbank and Investec
<b>Culture:</b>	A group of persons characterised by language, religion, cuisine, social habits, music and arts. It is the norms and chords which bind a group of people together.
<b>Dompas:</b>	An official (identity) document used by black people during apartheid.
<b>Ecological:</b>	Relationship between organisms (people) and their environments (business).
<b>Ecosystem:</b>	A complex network or interconnected systems.
<b>Emancipation:</b>	The fact or process of being set free from legal, social or political restrictions; liberation.
<b>Emotional quotient (EQ):</b>	The level of a person's emotional intelligence, often as represented by a score in a standardised test (Lessem et al., 2014).

<b>Epistemology:</b>	A branch of philosophy which deals with the sources of knowledge, especially the critical study of its validity, methods, and scope (Hallebone & Priest, 2009).
<b>Ethnographic:</b>	A term that refers to an integrated method, procedure and Content Analysis: technique for locating, identifying, retrieving and analysing documents for their relevance, significance and meaning.
<b>Funnelling:</b>	The process of narrowing and fine-tuning innovations.
<b>Fusion:</b>	Internal technology system used in client-servicing mirroring internet banking to execute client instructions.
<b>Group Areas Act 41 of 1950:</b>	Apartheid legislation designed to embed the principle of racial separation, designing separate areas for specific racial groups.
<b>Hogan:</b>	FNB's mainframe (database).
<b>Hostel:</b>	Compounds built to house miners or mining labourers during apartheid.
<b>Human niches:</b>	The term describes the areas in which people excel because of the questions of existence they ask (Laubscher 2013).
<b>Hut:</b>	A small house made of mud, stones, wood and grass.
<b>Illegitimate womb of Apartheid:</b>	The womb of Apartheid representing a historically dark era in South Africa's history.
<b>Inclusivity:</b>	"A radical organisational transformational methodology which aligns the doing and the being side of the organisation around commonly defined principles and values, co-created by all" Viljoen (2008:17).
<b>Integral Research Approach (IRA):</b>	This is a qualitative research approach towards social and economic transformation which is transcultural and trans-disciplinary. It builds on the knowledge from all four worlds (South, East, North and West) Lessem and Schieffer (2009). IRA is rooted deeply in individual specific cultural context aimed at addressing individual or societal burning issues at the level of self, organisation and society thereby bringing about global integration (Makangira:2015).
<b>Intelligence quotient (IQ):</b>	A number representing a person's reasoning ability (measured using problem-solving tests).
<b>Knowledge workers:</b>	Intentional drivers of innovation sharing their expertise to innovate.

<b>Legitimate womb of rebirth:</b>	The womb of rebirth represents the incubator or innovation space created within FNB to drive successful implementation of the rebirth transformation journey.
<b>Leadership quotient (LQ):</b>	The level of fulfilling life purpose uniquely as well as authentically (Lessem et al., 2014).
<b>Matriarch:</b>	A woman who is the head of a family or the tribe's queen mother.
<b>Moral quotient (MQ):</b>	The level of strong values of community rooting and maternal leadership and accountability (Lessem et al., 2014).
<b>Nguni:</b>	A South African group of persons made up of the following: the Zulu, Xhosa, Matabele and Swazi.
<b>Non-voice:</b>	Administrative client-servicing that acts on written instructions received from the client.
<b>Organic:</b>	Something of a natural state.
<b>Organisational change and development (OCD):</b>	Deals with optimising individuals, groups, organisations and societies. It presents opportunities to impact on business performance, return on investment and ultimately business sustainability through playing an active role in mergers and acquisitions and radical organisational change such as technological changes and globalisation. OCD also deals with optimisation of a multi-cultural workforce, strategic formulation, facilitation and translation, as well as the value and behavioural components of the organisation through the <i>doing</i> and <i>being</i> in organisations. Through OCD there is an integration of socio-technical management and socio-psychological management traditions wherein interventions happen on individual, group, organisational and societal levels in various forms. It creates shared understanding, significance in transformational efforts, alignment, and, ultimately inclusivity as it is mandated from the top, and deals with leadership. It is concerned with the unleashing of individual and collective voice and therefore rising levels of consciousness (Viljoen, 2015: 3-4).
<b>Organisational Development (OD):</b>	"A scientific discipline and practice field concerned with multi-faceted change processes, primarily of a planned and sustainable nature, with the purpose of enhancing the adaptive and self-renewing capabilities of organisational systems in response to or in anticipation of shifts in stakeholders' needs or demands – as reflected by diagnostic data generated mainly through the application of behavioural science knowledge and technology and interpreted through collaborative sense-making and learning processes, facilitated by change agent(s),

and which involves a critical mass of organisational members in a manner that will ultimately contribute to improved individual, organisational and societal well-being.” Roodt and Van Tonder (2008:55).

**Pass Laws Act of 1952:** Internal South African passport system used during apartheid, limiting movements of black people.

**People’s pillar survey:** An engagement survey within FNB to measure employee engagement.

**Phenomenology:** An approach that concentrates on the study of consciousness and the objects of direct experience (Rossman & Rallis, 1998).

**Qualitative research:** Involves in-depth understanding of human behaviour and the reasons why such behaviour manifests (Morgan, 1979).

**Quantitative research:** Relies on the power of analysing numerical data (Irvine & Gaffkin, 2006) and usually ends with either a confirmation or disconfirmation of the hypotheses tested (Leedy, 1997).

**Rebirth:** In this thesis, rebirth refers to the researcher’s own personal Rebirth journey on which she embarks on in order to uncover her call and authentic identity. This is a visible outcome and manifestation creating an ecological transformational shift within an ecosystem through the rebirth journey.

**Rebirth (rebirth) transformation journey:** An organisational transformation journey designed to shift organisational culture, and drive innovations which allow an organisation to embark on its 4C journey towards inclusive transformation. The researcher facilitates the rebirth transformation journey which she designed and facilitated together with her participatory action research (PAR) team and implemented within the case organisation, FNB Private Wealth Client-Servicing.

**REBIRTH:** In this thesis REBIRTH posits itself as a deep enquiry into succinct levels of the self’s existence and the layers of emergent complexities within this dynamic. It is a deep enquiry within and from which multiple, yet meaningful and divergent stories are told and emerge. It is a creative experience which starts in the Southern relational path and unfolds into the four voices of global exploration, towards inclusive transformation and authentic identity. This is an integral research method and the researcher’s unique contribution which she offers as new knowledge towards inclusive organisational transformation. This REBIRTH can be implemented in other

organisations, and is the researcher's contribution to the field of study. This is the unique contribution of this study.

<b>Rebirth uhuru (West):</b>	Contributing within REBIRTH effects in the West through implementing innovations being Contribution.
<b>Rebirth conception (South):</b>	Grounding to Call in the South towards Rebirth in authentic identity and engaging indigenous wisdom to REBIRTH a unique value proposition.
<b>Rebirth awakening (East):</b>	Context emerges in the East through communal and cultural identity calling for new innovation.
<b>Rebirth exploration (North):</b>	Co-creation navigates to the North where communal enquiry and critical burning issues may be connected and addressed.
<b>Rebirth Mandala:</b>	Jung (1973: 20) defined mandala as, "the psychological expression of the totality of the self." The Rebirth Mandala is represented in this thesis as the researcher's 1987 artwork, Figure 2.1.
<b>Regulators:</b>	Banking regulator being the Financial Services Board (FSB).
<b>Research:</b>	A systematic investigation to establish facts or principles.
<b>Servicing community:</b>	The FNB Private Wealth Client-servicing community wherein the Rebirth transformational journey was deployed.
<b>Shareholder:</b>	FNB internal and external owners of stock(s).
<b>Siebel/CRM Dynamics:</b>	Customer relationship tool, in which the client's written instructions are received, acted on and monitored.
<b>Social quotient (sQ):</b>	Co-existing and creating balance within the greater ecosystem (Lessem, 2014). This sQ forms part of eight human aspects used in this thesis referred to as the 8Qs.
<b>Southern:</b>	Refers to the integral South point of Africa in Integral Research Approach (IRA) as applied in this thesis (Lessem, 2001).
<b>Spiritual quotient (SQ):</b>	The literal meaning is to observe with the eye to see and interpret the larger picture of reality and not to see from a close, personal and judgemental position only. SQ taps into the spiritual quotient through accessing spiritual consciousness. Zohar and Marshall (2000) coined the term Spiritual Quotient (SQ).
<b>Symbol:</b>	The best possible expression for something essentially unknown. Symbolic or non-linear thinking is holistic and right-brain oriented; it is complementary to logical, linear, left-brain thinking (Jung, 1953).
<b>Uhuru:</b>	A Swahili word meaning "freedom."

<b>Voice team:</b>	Inbound client-servicing where client instructions are received through the telephone and executed real-time (FNB Private Wealth Process document, 2011).
<b>Xhosa room:</b>	A boardroom at 5 Merchant Place, FNB Private Wealth Client-Servicing transformed into the rebirth innovation womb – to incubate the Rebirth transformation journey.
<b>Spiral Dynamics:</b>	This is a theory of human development that is based on the theory of bio-psycho-social system of human development (Graves, 1970). Beck and Cowan (1996) coined the term Spiral Dynamics. It argues that human nature is not fixed and that, when confronted by changing life conditions, humans are able to adapt to their environment by constructing new value systems that allow them to cope with the new reality. (Adapted from Laubscher, 2013).
<b>Systems thinking:</b>	A conceptual framework that allows people to understand how things, parts, people and events influence one another within the system as a whole and to see problems as multifaceted (Senge, 1993).
<b>Transformation:</b>	The process of change within self and other (Viljoen, 2015).
<b>Tribal circle:</b>	An inclusive group process that focuses on group problem- solving through conversation, and integrates systems-thinking and related or relevant organisational change and development process also known as the tribal womb of rebirth.

## ACRONYMS

<b>BU:</b>	Business Unit
<b>CEO:</b>	Chief Executive Officer
<b>CLD:</b>	Causal Loop Diagram
<b>CoE:</b>	Community of Experts
<b>CoEs:</b>	Communities of Experts
<b>CoM:</b>	Community of Mixes
<b>CoMs:</b>	Communities of Mixes
<b>CoP:</b>	Community of Practice
<b>CoPs:</b>	Communities of Practice
<b>CRSMP:</b>	Customer Relationship Systems Management Process
<b>EXCO:</b>	Executive Committee
<b>FGDs:</b>	Focus Group Discussions
<b>FNB PW:</b>	First National Bank Private Wealth
<b>FNB:</b>	First National Bank
<b>GENE:</b>	Grounding, Emerging, Navigating, Effecting
<b>IDIs:</b>	In-depth interviews
<b>KPI:</b>	Key Performance Indicator
<b>KRI:</b>	Key Risk indicators
<b>OCD:</b>	Organisational Change and Development
<b>OD:</b>	Organisational Development
<b>OFET:</b>	Origination, foundation, emancipation and transformation (Lessem & Schieffer, 2009)
<b>OSTY:</b>	Our Service to You
<b>PAR:</b>	Participatory Action Research
<b>PPS:</b>	People Pillar Survey
<b>RMB PB:</b>	Rand Merchant Bank Private Bank
<b>RMB:</b>	Rand Merchant Bank

<b>ROI:</b>	Return on Investment
<b>Rol:</b>	Return on innovation
<b>RSA:</b>	Republic of South Africa
<b>SLA:</b>	Service Level Agreement
<b>SOWETO:</b>	South Western Township where the history of the “black” South African struggle lies
<b>Da Vinci Institute TIPS™ framework:</b>	Technology, Innovation, People, Systems
<b>WBC:</b>	Work-Based Challenge

## PREFACE

This thesis is a sketching of my life tapestry through the lens of my lived experiences influencing me to embark on a 4C integral journey grounded in the Southern relational path of community, relations and reason as described by Lessem and Schieffer (2010). This journey emerges in conception toward identity, culminating in my life Call as REBIRTH matriarch rooted in the field of organisational change and development (OCD). In this thesis REBIRTH posits itself as a deep enquiry into succinct levels of the self's existence and the layers of emergent complexities within this dynamic. It is a deep enquiry within and from which multiple, yet meaningful and divergent stories are told, and emerge. I capture this journey as relevant in today's complex world in informing a new narrative towards inclusive transformation (Viljoen, 2008).

My research journey follows the 4C integral rhythm of Call, Context, Co-creation and Contribution as adapted from Lessem and Schieffer (2009). The reason for embarking on an integral journey is that it grounds me to my Call through the Southern relational path. I therefore engage the journey authentically through the lens of my lived experiences and realities shaping my life, precipitating a conception from which a quest towards identity and grounding to Call comes. In grounding to Call, my Context and communal story emerges, energising the navigation of my realities to co-create communal identity and effect a contribution resulting in social innovation. The 4C integral journey is purposeful, grounding me to my Call to transform our world through Rebirth in identity and authentic self-leadership.

The Call emerges through my lived experiences because of surviving and learning to navigate the complexity of growing up under a corrupt system of Apartheid designed to breed separateness, discord and social disintegration within self, other, organisation, communal social ecology, community and society. This system's consciousness is beyond race, gender, class or religion; it infiltrates all ecology, aborting integral human potential and organisational well-being. This becomes the burning issue for which I propose REBIRTH as organisational change and development solution towards inclusive transformation and social innovation. This REBIRTH is premised and grounded in Southern norms of *Botho-Ubuntu*, and purports that the South has intrinsic value to give towards today's global agenda of transformation. This value is deeply rooted in the philosophy of *Botho-Ubuntu*, an inherent essence of the human spirit. The South, in this thesis, represents Africa (Lessem, 2001).

I propose in this thesis that Africa should re-engage her feminine identity captured in communal spirit as relevant science for today's transformational agenda as Jung (1953) explained, if German masculine knowledge and African feminine wisdom are united, the divine child transformation is born. Africa should re-engage a new narrative to REBIRTH identity in diversity towards inclusive transformation. Africa has latent knowledge to impart towards the global agenda of transformation, and now is the season to reclaim her voice to effect spiritual ecology and inclusive transformation. The contribution of this thesis towards greater knowledge creation is REBIRTH as the solution towards organisational change and development premised in the Southern relational path of community and essence of *Botho-Ubuntu*. The South has value proposition to bring towards existing transformational models, this value is captured in traditional norms of identity in community, catalysing social innovation. This solution proposes that it is time for individuals, communities, organisations and society to reclaim authentic identity towards being and becoming. It suggests that the South is positioned to re-engage

what is authentically Southern into the larger world to ground the divergent transformational landscape towards inclusivity (Viljoen, 2008).

As transformation journey, the solution takes self, other, community and the larger world into a cathartic experience of death through interrogating sub-conscious conditioning and the impact of lived experiences to reframe a new narrative towards inclusive transformation. This transformative value is conceived within my lived experiences as a daughter of Africa whose life experiences and lessons are framed, first, within the abortive womb of Apartheid. I engage this life journey with deep scars, observation and enquiry regarding issues influencing my subconscious social systems grounded in identity. I incubate these experiences, and new sensing emerges because of grounding to Call in the South incubating a Rebirth conception through my story. This emerges in communal awakening through the story of my culture in the East wherein communal Context is interrogated and reframed, navigates through the North in communal Co-creation and effects a uniquely Southern Contribution in the West to catalyse social innovation. Rebirth is defined within the thesis as a visible outcome and manifestation creating an ecological transformational shift within an ecosystem through the rebirth journey.

In this thesis, I give three meanings of the concept rebirth, all written in diverse ways. I then break them down as follows: (1) **Rebirth** refers to my personal Rebirth journey on which I embark to uncover authentic identity. I use “Rebirth” to communicate a person’s own personal transformational journey with a capital R representing the beginning point of transformation which relates to going within and engaging the inner eye or spiritual quotient (SQ) engaging “I” or “self” as the first point towards holistic transformation. Transforming the “I” to cause greater ecological transformation is core as it becomes the platform from which inclusive and ecological transformation can be realised. It acknowledges that for systems to experience sustainable transformation, it becomes critical to begin with the parts of the system. (2) I facilitate the **rebirth transformation journey** which I designed and facilitated together with my participatory action research (PAR) team and implemented within the case organisation, FNB Private Wealth Client-Servicing. I use “rebirth”, all in lowercase to describe the rebirth within the case organisation as representing a team and organisational process for transformation which first starts within the team, representing WE, and filters out into the organization through US, representing the three-tiered frame of transformation and integrating the internal ecosystem being: I, WE, US. (3) **REBIRTH** is an integral research method, and my unique contribution which I offer as new knowledge towards inclusive organisational transformation, and being my contribution, I use full capital letters to describe it. This REBIRTH may be implemented in other organisations and is my contribution to the field of study which encapsulates both the internal and external factors required towards inclusive and ecological transformation. It is also the lens through which I frame my contribution, being the REBIRTH framework which captures the Southern relational path of community and reason designed to cause inclusive transformation in the larger world and embrace the gift and latent power in engaging authentic identity and the gift of *Botho-Ubuntu* (Lessem & Schieffer, 2010).

The thesis is grounded in the Southern relational path of Integral Research (IR) as described by Lessem and Schieffer (2009), and culminates in research within the case FNB Private Wealth Client-Servicing which houses two distinct wealth brands being FNB Private Wealth and RMB Private Bank as my research landscape. Within this landscape, I set up communities of practice (CoPs) as PAR team with clear roles which will be shared in Chapter 1. I clearly differentiate between the rebirth transformation

journey designed and facilitated by me for the rebirth journey in the FNB case where a participatory action PAR team supported me.

My contribution to the field of study is REBIRTH, which is the way in which such a REBIRTH transformation journey can be facilitated in other organisations. The integral research methodology of PAR and partly auto-ethnography; my personal Rebirth compels me to investigate issues of identity within my communal realities and the impact of lived experiences to drive social innovation. My ontology is phenomenology as I believe that we exist and co-exist in complex systems, and therefore require Southern, communal frames from which to drive inclusive transformation. My epistemology is feminism which means I adopt Integral Research Approach (IRA) and PAR that forms part of the Southern path.

The rebirth transformation journey becomes my Call and burning desire to cause inclusive transformation. This rebirth transformation journey is developed and applied within the FNB Private Wealth Client-Servicing case as the solution to the challenges facing this business unit. In this business unit, the impact of the rebirth transformation journey resulted in significant organisation and transformational shift culminating in myself as part of a team winning an innovation award in the category: “The Seamless Revolution of the Client Experience” (FNB Innovators Awards, 2013) and setting a new precedent.

Through deploying the rebirth transformation journey, this business unit (BU) adopted a business ethos which became grounding philosophy throughout the rebirth transformation journey being: “I Care (Heart); I Can (Head); I Commit (Hands)”, integrating whole human sensing fuelled from the I Care (Heart) centre and igniting Southern consciousness thereby reframing organisational being and becoming from the traditional, exogenous and ego focused: I Can (Head) premise to the intrinsic, indigenous focus being: I Care (Heart), integrating human ecology and engaging inclusive consciousness raising this business unit’s spiritual quotient and grounding its community to Southern Call. This becomes unique value proposition towards reframing the culture of this traditional wealth banking segment informing technology, innovation, people and systems in accordance with the as per Da Vinci Institute TIPS™ framework, and is a valuable contribution which I offer as Southern frame within the domain of organisational change and development (Lessem, 2001).

This thesis contains eleven chapters broken down as follows: Chapter 1 presents the background and introduction to the thesis and the 4C Integral journey. Chapter 2 captures my story and grounding to the first C of my integral journey being Call through the Southern relational path of community and reason. Chapter 3 is the story of my culture also focusing on the first C within which my communal Call emerges in the East. Chapter 4 captures the Context being second C in the story of FNB – the case study, and highlights critical burning issues which Private Wealth Client-Servicing. The business unit within the case organisation navigates in the North to co-create its value proposition towards the greater FNB 2025 vision.

Chapters 5 and 6 are presented within as the third C being Co-Creation with Chapter 5 capturing the story of communities of practice (CoPs) and their relevance as new people form within the case organisation FNB Private Wealth Client-Servicing, where I present the thinking and theoretical understanding. This influences my suggestion that communities of practice be put in place as a people form for moving FNB Private Wealth Client-Servicing forward. It is given as a first step towards addressing burning issues identified within this business, and ways in which this people form may

become the basis for driving inclusive transformation through rebirth. Chapter 6 presents the research methodology employed within the rebirth transformation journey outlining the study's philosophy representing the third C; Co-Creation.

Chapters 7, 8, 9 and 10 focus on the final C being Contribution of the study and effecting in the West, giving account of the practical process towards deploying an inclusive transformational solution to catalyse social innovation being Contribution within Private Wealth Client Servicing. Chapter 7 delves into the rebirth transformation journey and the process of applying it; as well as discussing the actual roles and involvement of the communities of practice (CoPs) in greater detail. In Chapter 8, researcher's participative observations and collective CoP voices in rebirth are presented. In Chapter 9, the thesis results, findings and recommendations from deploying the rebirth transformation journey are given, articulating clearly the impact and change which came about in the case organisation FNB Private Wealth Client-Servicing as a result, and Chapter 10 presents the conclusion to the thesis, tracing the journey taken from Chapter 1 and bringing holistic closure to the study while capturing the manner in which I set about answering the research question, illustrating how the research objectives were achieved, sharing delimitations of the study, and suggesting further research that could evolve from this study.

The unique layout of the thesis is given in Chapter 1 breaking down Lessem and Schieffer's (2009) Integral Research Approach and GENE phenomena being grounding to Call in the South, emerging in the East with Context, navigating to the North through Co-creation and Effecting in the West with Contribution also referred to as the 4Cs. The Integral Research Approach (IRA) used is therefore structurally different from traditional approaches, and begins with the introduction to the thesis, Rebirth conceptualised, and the three Rebirth meanings given. Integral Research Approach (IRA) is explained and key concepts are defined, the research question posed, research objectives set, and the PAR team introduced. The 4Cs of integral research within the context of the thesis are explained and a conclusion is reached. This unique presentation in approach is an energising frame, empowering me to approach the structure and process of the thesis in an authentically creative manner, engaging my whole being and the entire world, thereby connecting deeply to issues impacting transformation in self, other, community and society in a meaningful way.

I have an insatiable curiosity with concepts of identity, and ways in which these may be located within the construct of purpose to facilitate inclusive transformation catalysing social innovation. This led me to a love for integral organisational change and development with a burning desire to impact lives and communities ecologically. This love is fuelled by working within the transformational domain and observing the lack of transformation within organisational ecosystems despite various attempts at transformation. My insatiable curiosity is fuelled further by the intrigue I have in organisations wanting to lean mostly towards North- Western influences and solutions to drive transformation.

The growing conversation and enquiry in my mind are, "does Africa have something to offer; a lens or frame that could meaningfully balance the current perspective and transform existing discourse in an inclusive manner?" I believe the season to unlock indigenous approaches is now. I therefore wish to offer an African perspective towards ecological transformation through this thesis. The study reconnects to the organisational soul, and proposes that the South has immense value to bring forth in co-creating transformational solutions bringing unique contribution towards inclusive

transformation catalysing social innovation. Ultimately, this thesis also served as an integral journey towards my own Rebirth.

## ABSTRACT

In divergent ecosystems around the world, there is a desire for visible, integral ecological transformation. A lack of ecological transformation is found within various domains beginning with the self, team, organisation and society, and is partly influenced by the loss of identity both within and without the larger ecology. Notably, the issue of identity and transformation remains a burning platform within the African context, for which the researcher proposes a solution grounded in the Southern relational path of community and reason (Lessem & Schieffer, 2009). In the context of this study, the researcher was invited to lead and transform a wealth banking business unit that had become a liability to the greater FNB brand, reflecting the lowest engagement scores at the time.

The research methodology was built on the foundation of the 4C Integral Research Approach (Call, Context, Co-creation and Contribution). Each one of the four research paths is integral, as each includes local Origination, local-global Foundation, all-round Emancipation and Transformation towards a consistent path to social innovation. Focusing on FNB Private Wealth Client Servicing as the research community, the researcher set up various communities of practice (CoPs). The applicable ontology was phenomenology, adopting Southern, communal frames from which to drive inclusive transformation, and the epistemology was feminism, encompassing integral research and participatory action research (PAR) as part of the Southern path.

The research design followed an integral design on the Four Worlds of South, East, North and West, contextualised using the 4C rhythm and the grounding, emerging, navigation and effecting (GENE) integral paths of renewal towards social innovation.

Data was gathered by qualitative means such as participative observations, community engagements, discussions and interviews. The researcher analysed the gathered data by measuring its quality in terms of valuable and truthful results of REBIRTH data analysis. REBIRTH is an innovative organisational change and development process located in the South, and has potential to be adapted and applied within FNB as the rebirth of the transformation journey.

REBIRTH, engaged holistically, is designed to cause inclusive transformation though enabling an organisation to re-engage the issue of identity as catalyst for inclusivity. It is a creative experience which starts in the Southern relational path, and unfolds into the four voices of global exploration, towards inclusive transformation and authentic identity. REBIRTH reconnects self, other, community and organisation to identity in *Botho-Ubuntu*, captured in the FNB case study vision as: "I Care (Heart), I Can (Head), I Commit. *Botho-Ubuntu* is an African philosophy which draws us back to the value of our humanness and offers an authentic lens through which to view transformational practice.

The REBIRTH transformation journey was successfully tested within FNB Private Wealth Client Servicing and FNB Wealth Inland. Grounded in traditional and indigenous knowledge, it offers a new lens for leadership towards inclusive transformation, founded in Southern values and norms and grounded in the essence and philosophy of *Botho-Ubuntu* as an authentic Southern frame to reconstruct the complexity of today's ever-changing world.

## **CHAPTER 1: An Introduction to the 4C Integral Journey and its GENE elements**

*In the long run, the great gift to the world by Africa will be in the field of human relationships. Whilst the great powers of the world may have done wonders in giving the world a military and industrial look, the great gift still has to come from Africa, giving the world a more human face.*

*- Biko (2006:51)*

### **1.1 Introduction**

In this thesis, I present my personal journey, a cultural journey and the organisational transformation journey which I facilitated in one of FNB's business units (BU), being FNB Private Wealth Client-Servicing. The story of this organisational transformation journey is my research called Rebirth, which I facilitated within FNB Private Wealth Client-Servicing being the case organisation, given that I was this BU's Organisational Change and Development Head. I begin with positioning the 4C integral journey as described by Lessem and Schieffer (2009), and its relevance towards my journey into my personal Rebirth; REBIRTH as my contribution and solution towards already existing transformational solutions within the domain of organisational change and development and the rebirth transformation journey as deployed within the FNB case.

It is this journey, being REBIRTH that I present in this thesis towards existing knowledge in the body of global transformation designed to cause an organisational change and development approach catalysing ecological transformation resulting in social innovation in other organisations (De Vos, 2002). I adapt the following working definition for the concept REBIRTH as, "a deep enquiry into succinct levels of the self's existence and the layers of emergent complexities within this dynamic. It is a deep enquiry within and from which multiple, yet meaningful and divergent stories may be told and emerge." I will attempt to uniquely position REBIRTH as an integral journey towards transformation, which begins through grounding in the South, emerging in the East, navigating towards the North and effecting in the West per Lessem and Schieffer's (2009) 4C integral research.

I am grounded in the South, and this thesis reconnects me to authentic identity located in purpose towards my reason for being. Mazrui (1990), points to the importance of local identity as relevant in today's global village, and ways in which developing this local identity is crucial for continuing evolution. Accordingly, it will be shown in later chapters that identity is a critical burning issue which impacts the ability to transform in an inclusive manner. Through the 4C integral journey the South represents my Call and it is within this Call that I can engage mental models of existence to emerge whole. In this Chapter, I firstly position the Integral Research Approach (IRA), unpack the 4C integral journey as applied within this thesis to set its foundation and present the unique layout of the thesis. Secondly, I conceptualise Rebirth within self, rebirth as applied in the FNB case and uniquely position REBIRTH as a contribution to the field of study. Thirdly, I present the thesis' research question, objectives and participatory action research (PAR) team. Fourthly, I describe key concepts within this thesis, and finally conclude with a summary of Chapter 1. Paragraph 1.2 below conceptualises rebirth in its three forms.

## **1.2 Rebirth conceptualised**

Rebirth as defined by Jung (1968:113) is a physical, emotional, spiritual and psychological transformation journey requiring open courage and great resilience to navigate internal change. It is a challenging, yet deeply meaningful journey towards wholeness and uncovers the Southern relational path in communal identity (Lessem & Schieffer, 2009). The three rebirth forms will be described in sub-paragraphs to follow.

As I conceive and carry the impregnation of the journey to full gestation, I may be viewed as the REBIRTH matriarch. The comprehension of the rebirth transformation journey implemented in the case organisation is also my brainchild. I distinguish between my Rebirth in my personal story, the rebirth of the FNB case as the organisation, and REBIRTH as a PAR process that can be applied in other organisations. The rebirth transformation journey therefore bears three succinct meanings which follow.

### **1.2.1 Rebirth**

The first Rebirth definition in this thesis refers to my personal Rebirth journey on which I embark to uncover my Call and authentic identity. It is through this Rebirth that I embark on a personal journey into the South to reconnect to Call through engaging realities of my lived experiences as told in Chapter 2, my story, and Chapter 3; the story of my culture. I define Rebirth as “a visible outcome and manifestation creating an ecological transformational shift within an ecosystem through the rebirth journey.”

I use “Rebirth” in this thesis to communicate my own or one’s own personal transformational journey with capital R representing the beginning point of transformation which relates to going within and engaging the inner eye or inner self or “I”, engaging the spiritual quotient (SQ) as a first point towards holistic transformation. Transforming the “I” to cause ecological transformation is at the core as it is the platform from which inclusive transformation can be realised. It acknowledges that for systems to experience sustainable transformation, it is necessary to begin with the parts of the system.

### **1.2.2 Rebirth (rebirth) transformation journey**

The case organisation, FNB Private Wealth Client-Servicing has become a liability for the greater FNB brand due to its consistent non-performance and loss in reputational capital. I was requested to cause the necessary change to transform this BU. This is where I propose the rebirth transformation journey which I designed and facilitated together with my PAR team. The research CoP will be discussed in Paragraph 1.8 of this chapter. I define rebirth as “an organisational transformation journey designed to shift organizational culture and drive innovations which allow an organisation to embark on its 4C journey towards inclusive transformation.” I facilitate the rebirth transformation journey, which I also designed and facilitated together with the research CoP and implemented within the case organisation, FNB Private Wealth Client-Servicing.

Jung (1968:114) stated that a rebirth might be a renewal where “personality which is renewed is not changed in its essential nature but is instead restored or enhanced.” Furthermore, he states that it is a renewal that originates from within. This type of rebirth also integrates a second type of renewal which may be resurrection and “the one, who is resurrected, goes through a change or transformation of one’s being.” I use “rebirth”, all in lowercase to describe the rebirth within the case organisation as representing a team and organisational process for transformation which starts within the team,

representing WE, and filters into the organisation US, representing the three-tiered frame of transformation, and integrating the internal ecosystem being: I, WE, US.

### **1.2.3 REBIRTH**

REBIRTH is the third and final meaning applying within the context of organisational change and development. I position REBIRTH as my organisational change and development (OCD) methodology which may be implemented in other organisations, and which is my contribution to the field of study. REBIRTH as an organisational change and development transformation journey engages the resurrection to bring renewal, as stated by Jung, wherein the spiritual intelligence connects with the spiritual identity. This is grounded in what Lessem and Schieffer (2009) referred to as the integral enterprise whereby nature, culture, science and management are integrated. Traditional African leadership takes us back to reconnecting with tribal wisdom which is captured in the rich diversity and ecological community, embracing man and nature as whole and thereby manifesting collective REBIRTH (Khoza, 1994).

REBIRTH is a transformational journey designed to shift organisational culture and drive inclusive social innovation. Within the context of this study REBIRTH is framed as an organisational transformation journey within integral research, enterprise and economics, designed to create an organic and ecological shift towards social innovation (Lessem & Schieffer, 2014). It is a holistic transformation journey grounding self, other, community and the larger ecology in authentic identity and nature towards innovation and inclusive transformation. Further to the working definition in Paragraph 1.1 above, REBIRTH in this thesis: “is a creative experience which starts in the Southern relational path and unfolds into the four voices of global exploration towards inclusive transformation and authentic identity. This is an integral research method and my unique contribution which I offer as new knowledge towards inclusive organisational transformation. This REBIRTH may be implemented in other organisations and is my contribution to the field of study.” Within the context of the 4C integral journey deployed and tested in the FNB Private Wealth Client-Servicing case, I am an Organisational Change and Development Head who conceives the rebirth transformation journey and transformation solution for FNB Private Wealth Client-Servicing to embark on which I facilitate.

I use only capital letters to describe REBIRTH as it may be implemented in other organisations as my contribution to the field of study which encapsulates both the internal and the external factors required towards inclusive and ecological transformation. It is also the lens from which I frame my contribution, being the Rebirth framework, which captures the Southern relational path of community and reason (Lessem & Schieffer, 2010). REBIRTH endeavours to translate into a platform of higher consciousness to guide leaders and elders toward understanding what is meaningful and most advantageous to the whole of society, community and the corporate business world (Nkomo, 2006) and Bellman (2000) through dialogue and story-telling. This transformation journey is also designed to shift organisational culture, create social innovation and transform. Through this thesis, the rebirth journey emerges as a collective outcome of the PAR team.

### **1.3 Integral Research Approach (IRA)**

The Integral Research Approach (IRA) in this thesis is one that seeks to explore a relational path towards the rebirth transformational journey. It is adapted from Lessem and Schieffer’s (2009) unique

educational approach towards social innovation and social economic transformation through realising the collective and individual GENE-ius, most specifically from a Southern relational path, hitherto most neglected by the all-pervasive North-West. Table 1.1 below is an illustration of the GENE and 4C integral paths (Lessem & Schieffer, 2009). The research case study is within FNB Private Wealth Client-Servicing during the period 2012 to 2015 with 2011 as pre-research period and 2016 as post-research.

**Table 1.1: Integral Research Approach GENE phenomena**

GENE (Lessem & Schieffer)	4 Cs according to Lessem and Schieffer	Global Sphere	Research Methods
<b>Grounding</b>	Call	South	Descriptive
<b>Emerging</b>	Context	East	Phenomenology
<b>Navigating</b>	Co-Creation	North	Feminism
<b>Effecting</b>	Contribution	West	Participatory Action Research

Table 1.1 above depicts the 4C Integral Research Approach (IRA) as adapted from Lessem and Schieffer (2010). The Southern relational path is the path that I follow (Lessem & Schieffer, 2010). This thesis originates through the path of community in the South wherein I ground to my Call, and invoke a Rebirth conception towards authentic identity. It emerges in the East as Context, where Rebirth awakens; navigates to the North to Co-create with my community the critical burning issues within my communal realities and effects in the West as Contribution through a new Southern value proposition resulting in inclusive transformation, catalysing social innovation.

Applying IRA as a method enables one to ground through an experience which engages auto-ethnography (Viljoen, 2016). Laubscher (2013) defines auto-ethnography as a form of self-reflection and writing (autobiography) in which the researcher writes about his or her personal experience connecting these experiences to the greater cultural, social and political meanings and understandings in relation to others in society. An integral study relies heavily on the auto-ethnographical voice of the researcher (Laubscher, 2013).

## **1.4 Key Concepts**

### **1.4.1 Rebirth (rebirth)**

Rebirth (rebirth) in this study refers to the rebirth transformation journey which promotes suspension of judgement and precipitates the evolution of effective people management systems that can essentially produce resilient leadership within FNB Private Wealth Client-Servicing. Maternal African leadership is integrated within the rebirth transformation journey (Banhegyi & Banhegyi, 2006). This journey taps into larger vistas to find an integral space to hold a more participative people-centric platform through participatory action research (PAR) as the methodology applied in this thesis. This involves embracing the principle of integral leadership, which, as described by Matupire (2014), involves working with individuals, groups and organisations bringing together multiple perspectives that instil effective leadership at all levels of an organisation.

Within the rebirth transformation journey, I engaged constructs which enabled and supported this journey within the case organisation. These constructs are *Botho-Ubuntu*<sup>1</sup>, nature, dialogue, storytelling, symbols and the tribal circle which I also refer to as the womb of rebirth. The constructs used in rebirth will be presented in Chapter 7 of this thesis where the practical application of the rebirth transformation journey is discussed.

#### **1.4.2 Organisational Change and Development (OCD)**

There are numerous definitions for organisational development (OD) available in existing literature which is similar (Viljoen, 2015:2). Viljoen (2015:2) furthermore states that these definitions agree that OD deals with the following:

- i. Improving organisational effectiveness through a planned systematic approach
- ii. Improving organisational environment, health and effectiveness
- iii. Changes in organisations to make them more effective
- iv. Interventions form part of the scope of practice.
- v. Strategies form part of the rebirth journey and the field of study being OD, culture, environment and people optimisation.
- vi. On-going improvement issues and sustainability of organisations

These definitions are closely linked to the rebirth transformation journey within the case organisation and more importantly my unique contribution within the field of study being, REBIRTH. This research embarks on a journey towards inclusive transformation within organisations driving sustainable organisational change and development. Roodt and Van Tonder (2008:55) define OCD as:

“...a scientific discipline and practice field concerned with multi-faceted change processes, primarily of a planned and sustainable nature, with the purpose of enhancing the adaptive and self-renewing capabilities of organisational systems in response to or in anticipation of shifts in stakeholders’ needs or demands – as reflected by diagnostic data generated mainly through the application of behavioural science knowledge and technology interpreted through collaborative sense-making and learning processes, facilitated by change agent(s), and which involves a critical mass of organisational members in a manner that will ultimately contribute to improved individual, organisational and societal well-being.”

In the field of study, OD becomes a catalyst towards successful organisational change and transformation. OD therefore is premised on human relations with employees encouraging and influencing a culture of expanding knowledge and effectiveness towards achieving a collective vision within organisations (cited by Viljoen, 2015:2). Viljoen (2015) rightly states that organisational change resides in the heart of OD. It is therefore in this regard that she positions OCD in an elaborative definition which states:

“...OCD deals with optimising individuals, groups, organisations and societies. It presents opportunities to impact on business performance, return on investment and ultimately business sustainability through playing an active role in mergers and acquisitions and radical organisational change such as technological changes and globalisation. OCD also deals with optimisation of a

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<sup>1</sup> Mbigi, L and Maree, J (1994), define *Botho-Ubuntu* as a quality that includes the essential human virtues; compassion and humanity.

multicultural workforce, strategic formulation, facilitation and translation as well as the value and behavioural components of the organisation through the doing and being in organisations. It is through OCD that there is an integration of socio-technical management and socio-psychological management traditions wherein interventions happen on individual, group, organisational and societal levels in various forms. It creates shared understanding, significance in transformational efforts, alignment and ultimately inclusivity as it is, mandated from the top, and deals with leadership. It is concerned with the unleashing of individual and collective voice and therefore rising levels of consciousness (Viljoen, 2015:3-4)."

OCD in this thesis is therefore aligned to the above definition, and purports to engage rebirth as a tool towards inclusive transformation catalysing social innovation within FNB Private Wealth Client-Servicing and REBIRTH as my contribution to the field of study which can be used to transform other organisations.

### **1.4.3 Transformation**

Viljoen (2015:28), states that organisational transformation implies in-depth change in the way individuals, groups and organisations behave. Further to this, Zohar and Marshall (2000) state that: "the emotional and spiritual resources of an organisation may be accessed using bonding symbols, myths, ceremonies and rituals." Mbigi (2000:96) states that; organisational transformation is not simply an intellectual journey, but is also an emotional and spiritual journey. Organisational transformation is therefore a collective effort which requires the organisation and its employees to connect spiritually to thrive and realise their common vision. This enables all parties to hold each other accountable where the transformation process could be hindered.

### **1.4.4 Inclusivity**

Viljoen (2015:13) defines operational inclusivity as, "a radical organisational transformational methodology which aligns the doing and the being side of the organisation around commonly defined principles and values, co-created by all." Viljoen (2015:13) further supports this definition with the below extension:

"It is a systemic approach that focuses on underlying beliefs and assumptions, and challenges patterns within the individual, group and organisational psyche to spend energy and engage in a sustainable, inclusive manner with the purpose of achieving a shared consciousness."

It is through the lens of these definitions that I as the researcher embark on my personal Rebirth journey and ground to my Call, in authentic identity. This culminates REBIRTH and the unique value proposition which forms the basis for this study. In this thesis, a typical inclusivity approach is implemented in the case study as rebirth transformation journey within FNB Private Wealth Client-Servicing.

### **1.4.5 Human aspects used in the thesis**

The REBIRTH transformation journey can be broken down into various functional constructs. These functional constructs address specific requirements within the human system in the diverse landscape of banking. This transformation journey becomes a tool for integral innovation towards a future narrative. This journey bears resonance with Scharmer's theory-U (2007) as adapted in thesis and will be presented in Chapter 7 capturing acute norms of spiritual wisdom as infinite genius. These norms are presented in this thesis as the eight human aspects (8Q's) being the spiritual quotient (SQ),

emotional quotient (EQ), intelligence quotient (IQ), moral quotient (MQ), body quotient (BQ), work quotient (WQ), social quotient (sQ) and leadership quotient (LQ) adapted from Scharmer's theory-U (2007) each of which will be discussed briefly below:

#### **1.4.5.1 Spiritual quotient (SQ)**

The spiritual quotient (SQ) is the capacity for transcending the physical and material to tap into infinite wisdom (Zohar & Marshall, 2000). It is the ability to experience heightened states of consciousness and to sanctify everyday experience. The ability to utilise spiritual resources to solve problems is through the SQ (Emmons, 2000). REBIRTH emerges and seeks to promote spiritual intelligence, and collectively develop communal culture which appreciates the supra-consciousness through the SQ. The SQ proposes that in every domain of organisational change and development, new rules for unifying community from the fragile to the anti-fragile through the reduction of fragility through deep psychological work towards harnessing anti-fragility will be required (Markides, 2012) and Taleb (2012).

#### **1.4.5.2 Emotional quotient (EQ)**

In REBIRTH, the community is embodied within the EQ wherein strong values of community rooting lie. Organisations require knowledge workers to be more committed to cohesive working interrelationships where emotional intelligence promotes the ability to sense, understands and effectively applies acumen of emotions (BarOn, 2013). The emotional quotient thus becomes an essential source of human energy, connection and collective influence. It is also important to note that knowledge is a critical resource in the work environment and learning organisations prioritise the creation and acquisition of new knowledge and emphasise the importance of emotional and spiritual intelligence (George, 2006); Zohar and Marshall (2001).

#### **1.4.5.3 Intelligence Quotient (IQ)**

Primarily, the intelligence quotient (IQ) solves logical problems as it measures mental intelligence. Carson and Lowman (2002) divided intelligence into fluid intelligence (reasoning), crystallised intelligence (knowledge), long-, medium- and short-term memory, quantities knowledge, visual processing, auditory processing, reading and writing, processing speed and decision/reaction time. IQ alone cannot ensure success. It is therefore important for human beings to connect their intellect capability to their spiritual and core beings. Gardner (1999:33) defines intelligence as "the bio-psychological potential to process information that can be activated in a cultural setting to solve problems or create products that are of value in a culture."

#### **1.4.5.4 Moral quotient (MQ)**

The moral quotient (MQ) is considered a strategic capital for any organisation, and it is in this regard that this quotient spirals forth in the womb of Rebirth to reinforce good behaviour, and to enable a sustainable social life (Beheshtifar, Esmaeli & Nekoie.Moghadam, 2011). Maternal leadership and accountability rest in the moral quotient (Lessem et al., 2014). Maternal leadership as described by Da Silva (2010) as a leadership method that inculcates building a family structure which functions holistically or governs in a motherly manner. Maternal leadership considers the African warrior as an important frame of reference within which to embody collective values regarding the environment as valuable to the rebirth transformation journey and within the South translates into the tribal circle (Field, 2000). Maternal leadership is characterised by a more feminine style of leadership with quality soft skills, long-term thinking, effective and collaborative traits to improve organisations. MQ is thus

the ability to differentiate right from wrong. Morality is based upon one's beliefs and values towards making decisions (Francis & Armstrong, 2008). Villa (2007) believes that the main pillar to organisational reputation is morality.

#### **1.4.5.5 Body quotient (BQ) health quotient (HQ)**

Within the body quotient (BQ), the health quotient (HQ) spirals out to collectively reflect what individuals know about their bodies, how they feel and how to take care of them (Tonserao, 2013). Respect for self and others, together with dignity, are embodied within the BQ. The HQ is about harnessing one's holistic health and well-being. The rebirth transformation journey promotes a clear state of mind, sharing of feelings and thoughts driving self-confidence. BQ and HQ are therefore barometers for creating well-being and balance in the ecosystem.

#### **1.4.5.6 Work quotient (WQ)**

The work quotient (WQ) involves high work ethics as a life force and performance tool, and is driven through WQ. This is the value of work capacity and of quality one brings to an organisation. In FNB Private Wealth Client-Servicing, the consultants and the leadership are often encouraged within the rebirth transformation journey to raise their hands for new opportunities and projects to which their skills and knowledge may add value. The rebirth transformation journey inculcates a high WQ as a way of being connected to Call to deepen spirituality (Zohar, 2000). The FNB Private Wealth Client-Servicing philosophy of "I Care, I Can, and I Commit" is fully engaged in this quotient as the integration of heart, head and hands within the ecology of the human system is awakened.

#### **1.4.5.7 Social quotient (sQ)**

The social quotient is about community and co-existing to create balance within the greater ecosystem. This is about sharpening people's skills through learning in community (Goleman, 1995). As people learn and assess them and their actions in certain situations, they begin to develop and shape their authentic behaviour towards others and self, which translates into a transformational value proposition premised in the South (Albrecht, 2004).

#### **1.4.5.8 Leadership quotient (LQ)**

Leadership quotient (LQ) focuses on fulfilling life purpose uniquely and authentically. Leadership quotient is a way of measuring leadership for its understanding and improvement in a way that overcomes many of the past measurement problems (Khoza, 1994). REBIRTH is therefore masterfully deployed as a transformational journey to sharpen LQ. Within FNB Private Wealth Client-Servicing, leadership is the real foundation from which organisational change and development can be driven towards inclusive transformation (Mbigi, 1995). In this thesis, the 8Qs have various functions within the human system which may be utilised towards rebirth exploration. My aim below is to answer my research questions and address the main objectives within the context of rebirth which are presented in Paragraph 1.5 below.

### **1.5 Research questions**

Guba and Lincoln (1987) describe how the method in which researchers go about finding out whatever they believe can be known; which means that the selection and application of an appropriate methodology becomes critical. Following a comprehensive review of applicable and associated literature within the domain of the field of study, minimal information was found on this topic within

the proposed value proposition perspective which will be discussed in the research methodology chapter, being Chapter 6 of this thesis. It was this gap in the research that led me to explore the subject from a wider perspective and this thesis is underscored by the following three research questions which will be dealt with in Chapter 6:

- i. How can organisations re-engage the conversation of identity as relevant for today's transformational discourse?
- ii. What process can result in connecting of identity to drive inclusivity?
- iii. What meta-insights can be derived in implementing a REBIRTH journey?

## **1.6 Research objectives**

The thesis research objectives seek to explore the value proposition in applying REBIRTH within organisations as a key strategic driver towards inclusive transformation, catalysing social innovation.

These research objectives seek the following:

- i. Understanding how the conversation of identity can be re-engaged to facilitate inclusivity
- ii. Deriving a process of transformation for healing
- iii. Deriving meta-insights into healing organisations through REBIRTH

## **1.7 The participatory action research (PAR) team**

Within FNB is a division called FNB Wealth within which a BU known as FNB Private Wealth Client-Servicing exists. This is where the research community is located, and where the case study is placed. This is the BU in which I worked. In. I carry both the objective and subjective view and experience which both inform the research in this thesis. FNB Private Wealth Client-Servicing's mandate is to grow client loyalty and increase scalability by providing a servicing platform that will result in an unparalleled client experience. Within this mandate is the need for strengthening client experience and innovation to grow efficient market share in the highly competitive wealth client market, where client demand for superior service has peaked.

Coming to work for FNB Private Wealth Client-Servicing in 2011 was not out of choice, but as time would show, a calling. Having previously worked in the Information Technology (IT) division of FNB Wealth where my role was directing and managing change in terms of project implementations, a move to restructure the business created an opportunity to be moved to an operating business area. At the time, I had been providing some guidelines and input to the business leader of FNB Private Wealth Client-Servicing and he indicated a desire for me to join his team. Not knowing a lot about the area or its challenges I chose to move as part of the business restructure, and found myself part of this business unit.

The first thing I looked to do was to understand the business challenges faced by the leadership of FNB Private Wealth Client-Servicing. This entailed having detailed discussions with leadership to diagnose challenges and in the end, summarise leadership's view of the challenges. Through these discussions, I assessed that there was poor leadership thinking, no unobstructed vision and strategic direction, resulting in disengaged human capital with low self-esteem and lack of drive to innovate.

My PAR team comprised of a Community of Practice (CoP) consisting of fifteen employees within the case organisation wherein everyone in this CoP committed to embarking on this rebirth journey to realise social innovation. This is the larger CoP which was a collective of the Community of Elders also known as Community of Experts (CoE), Community of Mixes (CoM) and a Sub-community of Practice (CoP). Each community comprised of five community members. Dr Colin Steyn was also a part of the PAR team whose role in the team was that of an external consultant who observed and engaged in rebirth from time to time. The story of the CoP will be told in Chapter 5 of the thesis. I will, however, introduce the CoP in the paragraphs below.

Community of Elders also known as Community of Experts (CoE) being Malcolm Horn, head of FNB Private Wealth Client Servicing as the sponsor and co-researcher in the PAR team of my study. Lebogang Ramagaga a service advisor in this BU was responsible for conducting and driving the research while Lauren Smith, a team leader, Lynton Peters and Neil Moodley also service advisors were the rebirth champions, logging, monitoring and driving innovations and knowledge sharing and embedding learning of the rebirth transformation journey. The Community of Mixes (CoM) included Shannon Fortuin, a team leader within the FNB Private Wealth Client-Servicing community and part of the management team for two years; was therefore able to bring broader context into view. Shannon was also responsible for organising interviews, forums, groups and managing different research laminations. Rudi van den Berg, another service advisor, was responsible for data-sourcing and decoding of research data. Kim Leonard, also a team leader with the case organisation, played a vital role in driving the rebirth culture into the office environment.

### **1.8 The 4Cs of integral research within the thesis**

In this thesis, the chapter layout follows the 4C integral journey as adapted from Lessem & Schieffer (2010) is presented in the following chapters: Chapter 1 as Introduction, Chapter 2 and Chapter 3 are grounded in the South as Call, Chapter 4 emerging in the East with Context, Chapter 5, and 6 navigating to the North as Co-creation and Chapters 7, 8, 9 and 10 effecting in the West with Contribution. A description and unique chapter layout follows:

Chapter 2 of this thesis is my Call, and presents the first C of my 4C integral journey, wherein my journey begins, and is grounded in the South through Call and community. This becomes a burning desire to re-engage a process of Rebirth towards authentic identity as told through my story – a Rebirth conception. Lessem and Schieffer (2009) referred to the Southern relational path as the path of community. My personal journey in grounding to Call is therefore based on Lessem & Schieffer's (2009) 4C integral path, described through the gene of South, East, North and West. In the South, I attempted to repurpose and reclaim my human identity and connectedness in community as a relevant lens and new science towards inclusive transformation.

Chapter 3 of this thesis is also within the first C being my communal Call and awakening into authentic self in community through the story of my culture. The calling is to cause inclusive transformation within organisational ecology. I thereby engage my life's journey culminating in over 20 years of work in deep transformational work through various methodologies, modalities, experiences and learning within the spheres of organisational change and development, coaching and inclusive transformation.

The Call on this thesis is influenced by a number of variables: a) Born a "Black" African woman in South Africa at a time where a corrupt system of governing called Apartheid designed to devalue the identity, dignity and freedom to humanness of self and community; b) observing cultural norms and practices which devalued the role of women, c) the role of religious practices used to institutionalise devaluing authentic identity through fear-based colonial practice and doctrines; d) the pain and brokenness the above has created in dehumanisation and discard towards being and becoming in self, other, community and ecology and how this separation continues to thrive in corporate, education, academia, health, society and the larger world; e) entrenchment of Western philosophies and patriarchal norms in organisational leadership frames and models driven mostly by ego systems and devaluing eco-communal, marginalising the indigenous value which is the indigenous (internal) towards the material exogenous (external).

Chapter 4 in this thesis emerges as the second C of my 4C integral journey, and represents Context. Context is presented in this chapter and focuses on the research I conducted within FNB Private Wealth Client-Servicing case which unlocked the door for me to engage the BU. This necessitated engaging a rebirth transformation journey which became the research journey towards transforming this BU. This enabled the community to come together and discuss burning issues, connect in solution creation, and thereby embedding new thinking and building a culture of innovation within FNB Private Wealth Client-Servicing, its culture and burning issue.

In Chapter 5 of this thesis I present the story of the Community of Practice (CoP) within the FNB case, which presents the third C of my integral journey, being Co-creation. Co-creation consists of two parts represented in Chapters 5 and 6 respectively. Chapter 5 positions CoPs and the value of engaging this people form to co-create a new narrative through investigating burning issues, current and future realities, through navigating in the North. It illustrates the thinking around how I created multiple CoPs within the rebirth transformation journey. However, for the purposes of the research, I chose to work with one CoP comprising of fifteen members as the data gathered within the larger CoP will be excessive for this thesis. In this chapter, I will discuss the role of each member and the CoP within the context of rebirth, and how I went about gathering data from the CoPs.

In Chapter 6 of the thesis, the second part of Co-creation is presented addressing the research methodology within which my research paradigm is presented. I present my research essence which is qualitative herein. My ontology being phenomenology is also presented in this chapter. I also present my epistemology as feminism and methodology as participatory action research (PAR). Integral Research Approach (IRA) wherein I present the research design and the four world and research paths which were applied within this thesis are presented herein. Furthermore, IRA through the grounding, emerging, navigation and emancipation (GENE) steps as adapted from Lessem and Schieffer (2012) are also presented. This chapter is key as the research method is presented here detailing the research design, data-gathering methods, data analysis and findings. In this chapter, the analytical IRA path as adapted from Lessem and Schieffer (2009) is presented.

The fourth and final C of my integral journey is Contribution and is presented in Chapters 7, 8, 9 and 10. Contribution brings the REBIRTH value proposition to the world as relevant transformational frame towards inclusive transformation catalysing social innovation. The integral journey within the research and rebirth transformation journey which is designed to cause integral transformation through

repurposing of self, other, community and the larger world to embrace the gift and latent power in engaging authentic identity and the gift of *Botho-Ubuntu*, a unique African value proposition is presented.

Chapter 7 of this thesis represents the first part of Contribution wherein rebirth, as transformational journey within FNB Private Wealth Client-Servicing effects through the West. It is also designed to present a new REBIRTH science and lens for leadership being and becoming, raising leadership consciousness and inculcating maternal African leadership methodologies as deployed in REBIRTH as transformation journey for organisational change and development, and offers an integral vision of Africa, its inherent wisdom and diversity.

Effecting rebirth in the West, as covered in Chapter 7, speaks to thriving on culture and innovation, resilient leadership whilst encouraging organisational learning resulting in sustaining reputational capital. This chapter represents the part of the fourth C, Contribution. Through the rebirth transformation journey, I seek to empower and enable FNB Private Wealth Client-Servicing community to rebirth collective identity to leverage on its diversity to create a safe maternal space wherein inclusive transformation, catalysing social innovation could thrive. This is realised through application of the rebirth transformation journey.

Chapter 8 of this thesis represents the second part of the fourth C, Contribution. In this chapter I present communal voices of the CoPs within rebirth as living theory. The significance of listening to these voices is to develop healthy communication and dialogue circles within which rebirth can thrive and capture the research responses of the CoPs and their experiences of rebirth. Furthermore, I present my research observations where I capture observations on a broad perspective in specific themes which became important in the rebirth transformation journey to address within FNB Private Wealth Client-Servicing.

Chapter 9 of the thesis is also discussed within Contribution as the third part and presents results, findings and recommendations of this research which are shared to illustrate the contribution of rebirth as transformational journey within FNB Private Wealth Client-Servicing and how REBIRTH can be applied to inclusively towards transforming other organisations and broader ecology. The Conclusion of this thesis represents the fourth C and is presented in Chapter 10 of the thesis, and revisits the purpose for the research, its Contribution and why REBIRTH transformation journey as a new lens is relevant to inclusive transformation catalysing social innovation within the domain of organisational change and development.

In Chapter 2, I tell my story and ground to Call. This begins my 4C integral journey as captured through my lived experiences.

## CHAPTER 2: My Story – grounding to Call, invoking a Rebirth conception

*I learnt that courage was not the absence of fear, but the triumph over it. The brave man is not he who does not feel afraid, but he who conquers fear.*

-Mandela (1996 cited in Matupire, 2015: 29)

### 2.1 Introduction

In Chapter 2, I introduce the first C in my 4C integral journey which is Call as described by Lessem and Schieffer, (2009), and ground to Call in my story. This grounding represents the entry point of my journey wherein I revisit my past through the lens of lived experiences growing up under a corrupt system of governance violating my identity and human dignity (Laubscher, 2013). I seek to reframe my reality and uncover authentic identity through the Southern relational path of community and reason (Lessem & Schieffer, 2010). This inquiry propels me to interrogate issues of identity and existence, invoking a Rebirth conception within. My story is grounded in the Southern relational path of reason and community as a foundational pillar to re-engage the issue of authentic identity and gift of *Botho-Ubuntu* (Lessem & Schieffer, 2010) and (Mbigi, 1997).

In this chapter, I explore my journey towards Rebirth, and investigate the context of the issues influencing my life through my lived experiences precipitating a deep longing for transformation. I therefore share interpretations of my journey and the need to ground to Call in authentic identity, located in my Southern path. This I do through the lens and interpretation of reconnecting to my artwork, positioned in this thesis as the Rebirth Mandala, Figure 2.1 as foundational catalyses new conversation. In this conversation, I aim at weaving through emergent metaphoric interpretations of my artwork throughout the thesis and place it within relevant chapters to make integral connections of my 4C integral journey and the importance of integrating it as holistic frame toward inclusive transformation.

The metaphoric interpretation of the Rebirth Mandala shows the divergent worlds within which I exist and co-exist, the internal and external systems influencing these worlds, placing the need for embarking in a Rebirth transformation journey of self as crucial in bringing congruence and inclusive well-being within. The following is testament to the spiritual power held within a mandala: “Man mandalas have an intuitive, irrational character and, through their symbolic content, exert a retroactive influence on the conscious. They therefore possess a ‘magical’ significance...” (Jung, 1954 cited in Viljoen, 2015: 134).

In line with Lessem and Schieffer (2010), the relational path to research is the paradigm used in this thesis. The first step is my story, wherein I revisit issues of identity through my lived experiences and reconnect to the South, grounding in identity and human dignity. This 4C integral journey as captured in my story, the story of my culture which represents my life history, invoked a rebirth conception towards Call, emerging in my Context in community, to Co-create communal identity and effect a unique Southern value proposition and Contribution towards already existing transformational frames. This culminates in Rebirth of self in identity and community takes me into a 4C journey from the South, to the East, North, West, and returns to the South with a new Southern value proposition being the rebirth transformation journey.

## **2.2 My personal journey grounding to Call**

My name is Ntombana Del also known as Mamohau within my communities, and it is July 30, 1970; the day of my birth. I am the physical embodiment of my personal Rebirth which was to later culminate into this thesis. I am the second of three children raised in Killarney, in the township of Soweto, South Africa. The entry point of my Rebirth journey begins in the womb – the illegitimate womb of Apartheid. I am born at a time in history when South Africa is steeped in political injustice and the government of the day, the Nationalist Party, has instituted Apartheid as a “legal system of governance”, brutally dishonouring the basic rights of people classified by the racial censors as “Black” and thereby nullifying my identity and human dignity in its entirety. Woods (1987:48) says: “Not since Hitler’s Nuremberg has any regime in the world inflicted so monstrous a burden of racial regulations on any community as the Afrikaner Nationalist minority government of South Africa has inflicted on the vast majority of its own citizens.”

While grappling with the daily issues of separation and survival under the cold brutality of Apartheid, I experienced a second point of Rebirth which illuminated my need for identity within my gender reality. I will never know the reason, but I am born a girl, raised as a boy for the first thirteen years of my life which was fuelled with conflict and torment as this created a deeper struggle to finding my identity. In this confusion and fear, I recognise the struggle of girl children and women in society as I could see and experience the pain of imprisonment that may come through cultural depreciation and norms. This forces me to recognise the value placed on boy children, and whatever resembles colonial etiquette and the strong world view of religion and culture; and how divergent the influences are. This creates dissonance not only in the human system, but also within the corporate system and in the greater ecosystem and is a challenge that I fully acknowledge evoking a Rebirth conception within and without my world and social ecosystem.

The journey of Rebirth is a personal journey on which I must embark, and this realisation is present in me from being conscious through my formative years into my adulthood. It is my life story, which ultimately culminates in my life work, grounding self in spiritual identity. Zohar (2004), states that spiritual intelligence is about the human need and talent for finding meaning in experience. This is an internal journey which according to Jung (1968: 114) might be a renewal where “personality which is renewed is not changed in its essential nature but is instead restored or enhanced.” Jung states that it is a renewal that originates from within. This type of rebirth integrates also a second type of renewal which may be resurrection and Jung (1968: 114) states: “The one who is resurrected, goes through a change or transformation of one’s being.”

I differentiate between my own Rebirth in my personal story, rebirth within the FNB case as the organisation and REBIRTH as a PAR process that can be applied in other organisations. My own rebirth is referred to as Rebirth. Rebirth within FNB is referred to as the rebirth transformation journey and my contribution to the field of study is described as the REBIRTH process. REBIRTH as described in this thesis, posits itself as a deep enquiry into succinct levels of the self’s existence and the layers of emergent complexities within this dynamic. It is a deep enquiry within, from which multiple, yet meaningful and divergent stories emerge and are told. It is a creative experience that starts in the Southern relational path and unfolds into the four voices of global exploration, towards inclusive transformation, becoming my life work and Call wherein I can be authentic in my humanness and identity. I believe this authentic voice is the power that has placed me here to manifest my quest

towards fulfilling this journey. I will return to the South to bring back the essential message to my community. My understanding of this journey is to cause a REBIRTH of the collective soul towards authentic identity and transformative significance. It is a Rebirth in and out of which I, myself will continuously spiral.

### 2.3 Interpretation of the painting and artwork – the Rebirth mandala

Figure 2.1 below is the Rebirth mandala and artwork that I painted in 1987, my final school year. This is a symbol of the rebirth womb and incubator from which the paradox and polarities of my life emerged. Little did the young Mamohau know that later, it would form an integral part of my PhD journey.

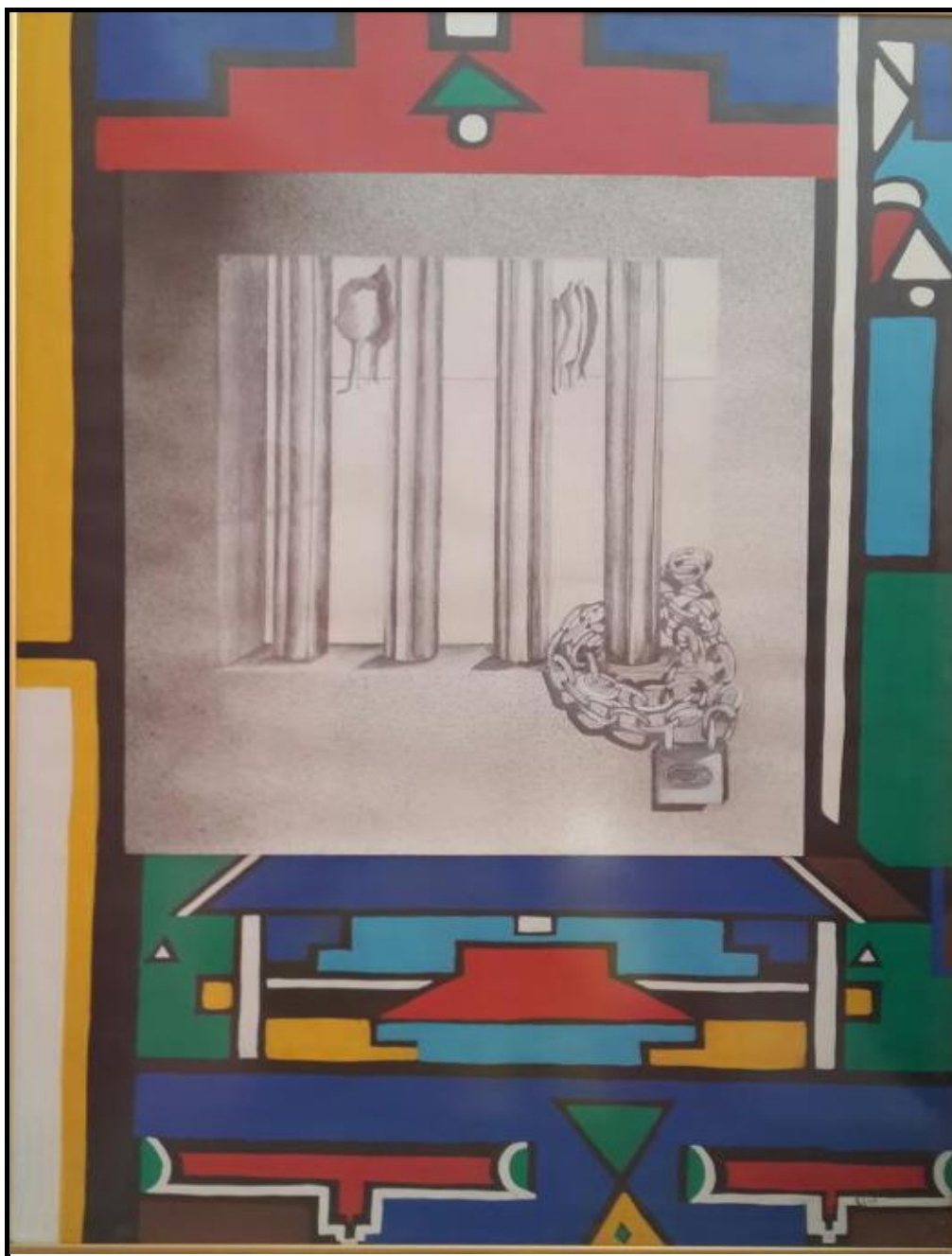


Figure 2.1: Artist M Sekgaphane, (1987) Oil on canvas: Rebirth Mandala

Figure 2.1 above symbolises an enquiry and conversation I engage to uncover the realities of both the dark and light sides in my 4C integral journey (Lessem & Schieffer, 2010). This conversation begins in my subconscious mind in 1987, as I sit in my final year matric art exam where I drew Figure 2.1 above as an expression of my lived realities titled: “The shackles of our minds” which was to later become the Rebirth Mandala, and a frame from which I located my Rebirth journey as I reframed the conversation of identity and inclusion. The reframing began in the year 1987, as I sat for my final art matric exam and culminated in this painting becoming the Rebirth Mandala as I continued to do inner work on self and outer work of transforming organisations. The title Rebirth Mandala is firmly embedded in the year 2000 as part of growing questioning regarding multiple journeys towards ecological transformation. This Rebirth Mandala is a representation of both the paradox and polarities of our lives and how interpretations based on the integration of our inner and outer worlds may differ.

The name Rebirth Mandala metaphorically represents the womb from which rebirth may be conceived, and yet in its original form emerges as linear. It is this very linear journey of sense-making into my identity that led me to seek the circular side of my being and lived realities to give new meaning to my Rebirth journey forward. I therefore refer to it as the Rebirth Mandala as it represents the first point of my whole being and becoming, and is the womb from where I could reengage my linear past towards a future, whole and inclusive narrative. This experience transcends the intellectual quotient to engage more deeply the essence of my humanness being my spiritual quotient. This conversation is designed to create new consciousness from which new life may emerge bridging my past and future. I engage this conversation with great intent, appreciating the power of conversation to heal and birth holistic future narrative. Wheatley, (2005:8) shares the following on conversation:

“...through our conversations, as we work together, we discover a greater wisdom that reveals our path forward.” It is the path forward which I seek to forge in grounding to identity and reengaging my story. I seek to engage my internal conflict in conversation as guided by the wisdom of a Somalian proverb which states: “The solution to a conflict is talking about the conflict.”

Within the Rebirth Mandala, is the prison cell, depicting the imprisonment I suffer and carry within my human aspects and eight quotients (8Qs) being: spiritual, emotional, intellectual, moral, body-health, work, social, and leadership, stifling potential resulting in death and discard within my human consciousness. This deep struggle inculcates a sense of subconscious mental imprisonment compelling me to explore a new future reality towards inclusive transformation. I am determined to break free and ground to core in my authentic identity catalysing new conversation. In this conversation, a rich frame of colour surrounding my prison cell emerges; this is the frame I begin to paint, and becomes my Rebirth Mandala towards inclusive transformation.

The Rebirth Mandala, Figure 2.1, becomes the entry point towards my first C being Call in my integral journey from which flows colour and new life, reminding me of my vast, rich Southern heritage, traditional norms, deep wisdom as a new gift to offer the world towards already existing theory in organisational change and development. This gift emerges and transforms from being my own Rebirth, into the rebirth transformation journey I was to later offer as solution towards inclusive transformation in the case FNB and ultimately as REBIRTH process I bring and contribute to exiting knowledge in transformational solutions. Figure 2.1 above, will be used as metaphor and symbol throughout the thesis and appropriately referenced in specific chapters.

The inner part of the Rebirth Mandala is the prison cell representing my internal fight for identity and human dignity. The coloured border is my cry for self, my community and society to break free of historic imprisonment, embrace authentic self and rich diversity to co-create a new story as captured in the freedom charter to offer a Southern perspective in transformational practice of leadership through the heart of community and the essence of the human spirit. Paragraphs 2.4 to 2.7 will focus on the metaphorical meaning of the artwork.

#### **2.4 Envisioning the Rebirth journey - the integral experience and ontological scaffolding of the painting**

The continuous questioning regarding my journey towards Rebirth still engenders today, and the hunger for freedom intensifies. There is a deep longing within to reconnect to core in authentic identity which becomes a consuming quest as the desperate isolation grows within individuals and institutions all around me. The fear intensifies until I find myself choking with this reality of separation and rejection within corporate and private realities. Re-entering the womb of the tribe Figure 2.1 translates into living theory and captures the realities that would conceive a Rebirth in my life as divergent communities, society and the greater ecosystem. In my final school year, I contemplated my life purpose toward a career and completed my schooling whilst being a newly-educated person in South Africa. I had a vision for my life, country, and my authentic voice translated into the key to unlock a new future as I painted a depiction of a journey towards rebirth. What follows is the interpretation of this journey and Rebirth mandala which is now in a private collection.

The reality of grappling with issues of identity and human dignity, the imprisonment and chaining thereof were conceived in the abortive womb of apartheid. The memory of this reality is deeply etched in my mind so that, as I sat for my final matric art examination facing the challenge of endings and beginnings, I shuddered to think how much longer I, myself, would remain chained by the shackles of my mind and the deep pain I carried daily in this mental prison. The prison bars emerged solid and unshakable. The chain; echoing a sense of death, yet within this death, there remained an innate knowing of a life waiting; a desperate call for Rebirth conception. The lock is bold and a constant reminder of the need to revisit the decomposed parts of my human identity framed through my Call. My iris becomes tender as new sight and seeing unfolds during my final art exam in the year 1987. The key to unlock my mental state is obsolete as the key is within me framed within my spiritual quotient (SQ) as described by Zohar (2000). In the distance, trees emerge and a dance with life and nature unfolds. In this dance, I cannot help but shout "Uhuru" as my authentic African spirit awakens, transforming into a graceful collage of vibrant colour, a symbol of my identity and cultural heritage, a new frame towards Rebirth.

#### **2.5 The significance of the Rebirth journey and building the ontological argument**

Jung (1953:4) describes archetype as "a kind of readiness to produce repeatedly the same or similar mythical idea." He further states that: "Archetypes are pre-existent form [s], (Jung, 1953:6), and true and genuine symbols that cannot be exhaustively interpreted, either as signs or as allegories. It seems to me that their origin can only be explained by assuming them to be deposits of the constantly repeated experiences of humanity," (Jung, 1953:8). Jung (1953) argued that archetypes are shared

universally and that implicit patterns of behaviour reside in the collective unconscious. Steyn (2001) stated that the child archetype was innate in every psyche, and almost needed no explanation. Jung (1953) focused on a few major archetypes. Myss (2001) has expanded Jung's repertoire to cover different dimensions of the major archetypes that Jung suggested. Within my personal rebirth I interrogate deeply the impact of my archetypal patterns through the lens of my artwork in Figure 2.1 which becomes my Rebirth mandala.

The archetype of the fool allows self-freedom to do as you feel, moving beyond judgement. I as storyteller became the fool and the world (Jung, 1968). What the fool represents is freedom as the fool leaves the prison, Figure 2.1, and leaves everything that is taking away from the story, all masks, behind. The fool packs his most important belongings, the most important meaning in life and puts them inside a bundle. My playground is the entire world with no predetermined ideas as I allow this journey to be moving me into my whole brain, the emotional, cognitive, intuitive, action and creative brain.

The significance of the archetype of the fool in this season of systemic consciousness is about embracing the fullness of being present, a fullness of consciousness in creating relevancy in your own evolution and existence and manifesting relevancy from within as new value proposition. This archetype represents a Rebirth of mankind's significance and realising the mandate for which mankind is called. The significance of this journey in the greater universal realm is that as humankind and organisation ground to Call; there may be an experience of inclusive transformation and thereby create sustainable and transformative evolution within the greater ecology.

## **2.6 The Rebirth transformation journey and I as organisational change and development practitioner and rebirth matriarch within the FNB case**

It is now 2011, and as I sit in the executive offices of a leading bank, I am aware of how the journey has come full circle. I am in a room called Xhosa and not Verwoerd. This room has been dedicated solely to the work of the rebirth transformation journey of which I am the womb. Xhosa has become synonymous with the rebirth transformation journey, a journey that sees servicing embark on a radical cultural shift towards living its new leadership and servicing philosophy of, "I Care (Heart), I Can (Head), I Commit (Hands)", awakening systems integration in whole sensing towards being and becoming.

The chain within the context of the FNB case, Figure 2.1 becomes necessary as FNB, no doubt will need to lock in and lock out whatever is necessary in its journey towards rebirth. A kraal, Ndebele art, representing wholeness in diversity, femininity, care and community, each shape and colour spiralling in a creative dance, brings balance to the ecosystem. South, East, North and West, fuse and come together in a new dance of life. I recognise, in this moment, the life force of my childhood experience and hear the voice of God impregnating my physical womb, "this shall be your life work; go forth, and heal."

Figure 2.2 below is a schematic representation of the Xhosa room which is a boardroom within the Rand Merchant Bank (RMB) building which I transformed into the rebirth innovation hub as part of the rebirth transformation journey. The Xhosa room is a room given by grace within an elite banking

institute to cause a rebirth transformation journey as the need to move from financial capital to spiritual capital is now dire. As I sit, looking through the window, I see vast greenery, signifying life and growth. The prison cell in Figure 2.1 becomes a full vibration of energy translating into a rebirth incubator and womb, and opens into the vast horizon towards wholeness in community towards social innovation. Emerging in Figure 2.2 below, this cell transforms an elite Wealth boardroom, traditionally used for executive meetings and changed into a rebirth incubator whose sole purpose is to incubate the work of rebirth to fully realise set objectives as discussed in Chapter 7 of this thesis.



**Figure 2.2:** Xhosa Room- Expanded womb and rebirth incubator- Rand Merchant Bank, 5 Merchant Place, Sandton (Sekgaphane, photo taken 2014)

The purpose of the Xhosa room, in Figure 2.2 above is solely to focus on deploying the rebirth transformation journey as credible solution towards organic and inclusive transformation to create an execution-orientated, value-capture mentality through a radical and committed approach. Workers in rebirth are mandated to take autonomy and responsibility for ensuring that the competitive advantage is achieved and maintained. Rejuvenating the innovation process requires the rebirth incubator to staff members at all levels and thereby re-allocate and distribute resources and skills to sustain this delicate process. This Xhosa room is a proclamation of how far I aim to go for the rebirth journey within FNB Private Wealth Client-Servicing.

As I sit in the Xhosa room, reflecting on the journey through the lens of my prison cell in Figure 2.1, and the divergent life stories which emerged to inform the story of REBIRTH as inclusive, transformational solution, and I am in awe of the gift of the womb, to carry life force to full gestation. The prison cell has transformed into a rebirth innovation incubator in the heart of metropolitan Sandton, inside a traditional, yet opulent, wealth bank. This room is solely dedicated to facilitating the work of rebirth, and was used daily throughout the rebirth period, 2012 to 2015 by myself as researcher and the research CoP. The Xhosa room allowed for research work to be executed throughout the rebirth transformation journey, including conducting alignment sessions, facilitating

focus group discussions and interviews, individual interviews, awareness sessions, relevant training and group intervention sessions for CoP members. This room also served as a space for reflection, monitoring and continuous improvement and all the work which I, together with the PAR team designed, facilitated and implemented.

## 2.7 My story – Grounding to Call and invoking a rebirth conception

The story of my rebirth conception is laced with the painful echoing of the struggle song in Box 2.1 below:

### Box 2.1: African struggle song, “Thina sizwe”

“Thina sizwe; thina sizwe, esimnyama;  
(We the black nation)  
Sikhalela; sikhalela, izwe lethu;  
(We are weeping for our land)  
E lahluthwa; e lahluthwa ngamabunu;  
(Which was taken away from us by white people)  
Mabawuyeke; mabawuyekumhlaba wethu;  
(Let them return our land)  
Hmm; hmm hmm hmm hmm hmm hmm hmm...”

This song in Box 2.1 above is infused in me from conception and becomes part of my future living theory narrative towards a Southern frame of leadership consciousness. The bellowing of the African’s struggle song remains a frame deeply etched in my consciousness. Day after day, they burst into song. Whatever the emotion, the medium of song becomes a powerful expression, a narrative, a story-telling towards Call in rebirth conception. This song becomes a medium of authentic expression that has not yet been bigoted. As I grow up and start to listen deeply, I realise how intrinsic this medium is to the African’s cry for dignity and human identity. I suppose the African mind had been battered and deeply brutalised through the many experiences birthed of the illegitimate womb of apartheid that the core medium for voicing erupts in song. Figure 2.1 depicts the prison within which my reality is framed. The bars emerge solid and unshakable. The chain is strong, and echoes a sense of death within my existential ecosystem. The lock is a solid is a reminder of a cry for identity and the imprisonment within which the reality of my humanity and existence is framed. There is no key in sight, and as I grow desperate to unlock this chain, I am hit by a lightning flashback.

It is a normal day in any six-year old’s life, and from my childhood innocence, I could not envisage the events which were about to unfold. The day is June 16, 1976 and African children have taken to the streets in mass protest to a system of education birthed of an illegitimate womb called Apartheid. This womb’s sole mandate is to perpetuate a system of human bigotry built on the foundations of separateness and colonial superiority. Within this foundation is an inferior system of education called Bantu Education, designed to thwart African human potential through proffering an inferior educational system designed to suffocate and imprison the African child’s mind, thereby aborting human potential.

As I continue playing in the kitchen of our four-roomed home, I am jogged to stillness by a sudden gush of disturbingly heavy noises. In my curious childhood state, I run out of the house by the kitchen door to engage a childhood enquiry, only to witness a brutal onslaught. A strong presence of heavy military troops encompasses my entire village, and a heavy grey cloud prevails. It is June 1976; the gnashing sounds of firing guns completely engulf all senses. Heavy screams, followed by silhouettes

dressed in black and white falling down uncontrollably. As I continue my seemingly innocent exploration, oblivious of the heavy stealth of death surrounding me, I am determined to find something to propel me up towards a deeper enquiry.

My senses heightened, I stretch my little hand onto a wall I would climb, and suddenly, in one swift movement, a firm grip whisks me back into the safety of my home. I was to learn, years later, that the silhouettes I had witnessed, involuntarily falling, were innocent lives of children brutally gunned down as they searched for freedom to connect to core and rebirth to the authentic self. Their crime was a quest to reclaim their identity and human dignity.

My name is Mamohau, and the entry point of my rebirth begins with the paradoxes of the womb of Apartheid. In this time, 1976, my country of birth, South Africa, is steeped in a corrupt system of governance called Apartheid which directly translated means separateness, and this system is legislated and legitimised as law. In this system, the essence of the human soul is divided along “colour”, classifying people per the following race groups: White, Black, Indian and Coloured with minority Whites perceived as superior to all. To maintain this system, several laws are legislated against Blacks to perpetuate and feed this consciousness of fear.

Apartheid systematically used legislation to create a rift between people where for much of South Africa's past, people were unable to co-exist harmoniously. Introduced in 1948, Apartheid survived for over four decades, facilitating an unjust system where minority “whites” were totally segregated from other racial groups, delineating their economic, social and political rights (The Group Areas Act of 1950). With Apartheid, interracial marriages and relationships amongst different races were outlawed (The Prohibition of Mixed Marriages Act of 1949). Blacks and whites were appointed separate beaches, schools, ambulances, buses and even drinking fountains and park benches. Despite international condemnation of this system, Apartheid survived for a long time, becoming ever more brutal in its suppression of black opposition despite international sanctions designed to foster change. This was achieved through the state strictly controlling the press and violently quashing any form of protest (The General Laws Amendment Act of 1962). Per O’Malley (2004) in 1960 police killed 69 people and wounded 176 people when they fired on a black demonstration against the pass laws. Sixteen years later, June 16, 1976, police opened fire on students in Soweto, protesting enforced Afrikaans teaching. By the end of the day 566 children were dead.

I grow, from my formative years, to internalise the dissonance caused by the unjust system of Apartheid towards me and the identity and humanness of communities, as well as the greater ecosystem, and it became my quest toward my life work framed within this study as a REBIRTH encapsulating the 4C integral approach grounded in the Southern relational path (Lessem & Schieffer, 2012). REBIRTH is a physical, emotional, spiritual and psychological transformation journey requiring open courage and great resilience to navigate internal change. It is a challenging, yet deeply meaningful journey towards wholeness and rediscovering the relational four paths in communal identity (Lessem & Schieffer, 2014).

My second point of Rebirth comes as a result of the paradox and polarities within my own community. I am born a girl who lives and experiences part of her formative years as a boy. Within this reality is the question for my identity and right to human dignity. I live through this experience within two

worldviews, unconsciously thrust back into a different form of apartheid, separateness and disconnect to my core. The events surrounding this experience precipitate a second point of Rebirth, and propel me toward a deeper enquiry. Being a little boy, I become a shadow of my older sister who is just three years older but is encouraged to connect to the core in her femininity.

I sense my entire community engaging a silent unconscious, agreement to dishonour my being and use a narrative of torment and mockery toward me. In this stage of my formative years, I am consciously awakened to the human psyche, its unconscious bias and need for separateness which go against the very essence of our communal African philosophy of *Botho-Ubuntu*. Notions of racism, classism, naming, gender equity, identity, human dignity, become heightened in my consciousness as I develop into my teenage years. Separateness versus wholeness, conscious versus unconscious biases becomes heightened concepts of intrigue from which I consciously, as well as subconsciously enter a journey towards exploration, unfolding into the 4Cs of my relational path. This journey leads me into the relevant study and ultimately my lifework wherein I become the Matriarch who gives birth to REBIRTH.

### **2.7.1 Envisioning Rebirth through family and lineage**

My father, Abraham Letswai, a descendant of the Batswana people from the Bakolobeng tribe was conceived, and was one of nine Sekgaphane brothers who co-owned a farm in a place known as Kaffirskraal during Apartheid. My father became orphaned at four years of age after his father was killed by a bomb and his mother had passed on when he was only two years of age. A strong believer and resilient man, he grounded himself in strong values which became a foundation and rooting for grounding to core. These values became birthed early in my life and were later to inform life's learning tools from which I could build and develop the rebirth transformation journey.

Through my father's life, I was to learn and experience the significance of nurturing one's human aspects and quotients through grounding to core from which calling, connecting and causing can be birthed. My father was the embodiment of a quiet presence, a living theory of the influence and power of servant leadership with a heightened spiritual quotient. He was the essence and gift of *Botho-Ubuntu*, and lived his life for and through community. Through the lived history of my father lies the seed of what would later become the rebirth transformation journey. He was a phenomenal human being, a man grounded and rooted to core through community, exuding purpose and deep gratitude. He was a warrior who stood unshaken for the values of truth and justice and imparted to us much learning driven from a deep source of love. He lived his life, with a heightened sense of purpose to transform and have a direct impact on the community and the larger society. Through the lens of the metaphor of the prison in Figure 2.1, I begin to recognise the emerging gifts within my father's life towards a reconstruction of my identity and human essence.

My mother, Thembisile Elizabeth (nee: Zulu), a descendant of the warrior Zulu nation is one of nine siblings born in a little coal town of Delmas in Emalahleni. Wealth in those days was measured by the number of children one had, and while my maternal grandparents would have been considered wealthy due to the number of children they conceived, they became a wealthy family financially too because of not only their ability to collaborate as a team, but due to fully understanding their strengths and weaknesses and working with both to navigate their circumstances within the gift of community.

Driven by strong spiritual values, my grandparents inculcated a deep sense of pride for human dignity within their children, and taught them the power of connecting to the spiritual core as a conduit towards wholeness and integrated well-being. It was in my grandparents' home where I first explored and engaged with the transformative power of story-telling and the emergent learning capacity thereof as we gathered around the fire. "Kwa sukela, she whispered to a rousing collective answer – Qhozi." In responding, the family was standing in agreement to enter and engage a journey of exploration and transformation through engaging the wisdom of story-telling. This was to begin a love of learning through story-telling which has continued to grow within the rebirth womb, and informed a significant part of driving subconscious healing within the rebirth transformation journey. Adodo (2016) states; healing is a transformation of worldview, including a transformation of economy and enterprise in an African context. He further states that true healing is integral.

My grandmother was an innovator who worked holistically within her family ecosystem to conceptualise, crystallise, create and craft new innovations. Innovation therefore, is a notion which was inculcated early within the African child's psyche as we learned to innovate making lives meaningful, and to survive the deprivation which was imposed because of the discard resulted from perceived identity. Through the Bantu system of education, the potential to grow in innovation was, however, thwarted and what was intrinsically of the South became lost to the Northern and Western influences. I must have learned my love for innovation from her.

My grandparents' home became a communal (hut) home where we would gather for various celebrations and communal renewal. It was in this home that I learned the wisdom and power of community. My grandparents loved education so much that their children were sent to boarding school as this was perceived to be the best environment to facilitate this. This was to become my mother's reality at a tender age of three, conceptualising separateness within her core. It was experienced within a similar time in my formative years and became a conduit towards exploring the need and workings of the mind to recreate past experiences in their future state.

With archetypal characteristics of an architect and a shape-shifter in her own right, my mother married at the tender age of twenty-one in a time where culturally women were perceived as inferior to men. Having grown up in a family where she observed her mother selflessly giving to all, she vowed to create a unique experience for her life, and later I became aware that these are Jungian archetypes. She garnered her family around her vision, and effectively raised her children to realise value of carrying vision early in life. I learned about vision, and the importance of having vision in creating a meaningful life, from my mother.

While being an integral part of the community, my mother remained rooted to the core of her unique gifting and taught us the value of celebrating this by not always conforming as she believed our ability to carry ourselves authentically was a fertile womb within which innovation could thrive. Blessed with a spiritually rooted husband, my mother found her voice, and established it firmly in our home. We, the children of this home were encouraged to voice through story-telling. The power and gift of voicing was therefore exposed early in our lives.

The home in which I grew up was a corner house of a busy intersection in the township of Killarney, Soweto. It was therefore the beginning and the end of all community engagements. Directly adjacent

to our home were hostels which, now in the South African political landscape became informal settlements for migrant labourers which subsequently became political grounds for festering factional fights orchestrated to perpetuate the divisions of apartheid through “black on black” killings. These killings would erupt without apparent reason precipitating a tangible presence of death all around the community. My home, being the first house, would be the entry point of this evil into the rest of the community, and in the still of the night, a mob would encompass it in their desperation to kill but always fell short of execution, causing this home to become the place for strategic formulation and planning towards saving the entire community.

As children, my siblings and I soon learned the importance of connecting to Call and using one’s gifting, as well as resources to connect critical communal issues in causing a different reality. We carved and co-created a unique ecosystem outside of the norms of societal influence wherein the human soul could flourish and innovate. Our home became the tribal circle wherein community meetings and conversation would take place. It became the lighthouse on a hill, and it was within this frame that my life’s journey and calling to transform were conceived with symbols, as well as archetypes within my story that pulled me deeper into this calling.

As I sit now in my final art matric exam, faced with endings and beginnings, I am acutely aware of my story, and use the space created in this art room to frame my new reality as captured in my art work the Rebirth Mandala in Figure 2.1. This journey unravels and spirals into a dance and celebration of colour towards my core in REBIRTH in the greater ecology. I am awakened to the stark boldness and presence of symbols in my story towards new narrative and new learning. I marvel at the infinite gifts and rich wisdom passed on through generations. I recognise the transformation within my own home where relationship and marriage transcend colour. This becomes a basis from which my transformational models are framed and a story into which I seek to delve deeper.

I celebrate the gifts of song and music birthed so deeply within my family ecosystem, and reflect with poignant humility on the days of walking long distances to Five Roses bowl in Soweto wherein power of music to transform was shaped and refined within me with this experience becoming a birthing of a rich musical heritage resulting in professional opera singing at the state theatre of South Africa. The gift of music was later to become a tool for transformational impartation within the rebirth transformation journey with a significant capacity to cause inclusive transformation.

As I continue my life journey, I find myself in a place of marriage; a “pinnacle” and sign of significant achievement within society. A place within which a woman’s “true” worth is placed and defined, a place of pride and honour within the community. In my innocence, I have bought unconsciously and subconsciously into this notion of “perfection” but awakened into what was to become my next point of rebirth through the experience of rejection and betrayal bringing to light a deeper level of separateness. In my desperate scramble for answers, I find all around me a stark darkness within which lies the paradox of the life force I am holding in my hands.

The dissonance I experience because of being a daughter, wife and mother heightens into a numbing crescendo around the question of identity and the notion of human dignity and as well as being or becoming. As I engage in a new enquiry towards spiritual Rebirth, I am faced with new and succinct levels of prejudice born of the human spirit. The notion of patriarchy within my society becomes

illuminated, and I am forced to interrogate my worldview and conditioning. I now begin to engage my senses more deeply towards new learning, and this heightens my senses and unlocks new consciousness within and without. These experiences unfold into a deeper enquiry towards a spiritual uncovering of the quotients within my human system.

## **2.8 Envisioning the 4C Integral journey within the Southern tribal circle**

As I reflect in the executive boardroom of a leading merchant bank, a room called Xhosa, Figure 2.2, a space that has consciously been created solely for repurposing this organisation through the rebirth transformation journey, I am in awe of the infinite power of the spirit to cause a rebirth transformation journey as a new lens and narrative to birth what is organic and inclusive. In Figure 2.3 below, Xhosa room initially described above, has been transformed into a rebirth womb within the FNB case. This is the beginning of 2012 in RMB, wherein my story, the story of my culture and the story of FNB have integrated in the rebirth transformation journey.



**Figure 2.3:** Rebirth tribal circle and incubation womb in the FNB Building-Xhosa room (photo by researcher)

Figure 2.3 above depicts the rich Southern symbols used in this research. Luscious greenery can be seen as rebirth living theory within FNB. In this room, I am impregnated with the rebirth transformation journey within the complexity and reality of this FNB case business unit. As I cast my eye back through the window of my prison cell in Figure 2.1, my spirit unfolds into a rhythmic unique tapestry of colour and lightness. My spiritual inner eye intensifies as the prison bars unfold into pillars of my strength awakening a future rebirth narrative toward authentic identity. The journey to Rebirth has evolved and transformed into what will now be deployed as a solution in the FNB case as the rebirth transformation journey.

## **2.9 Conclusion**

Chapter 2 captures my story which unfolds into my Call through this thesis, conceiving a Rebirth towards being and becoming. In this chapter, stories bear the rich heritage and transformational frames latent in the South. Having lived all my life in the South, I have come to appreciate through my story, the richness and value of the South to inform and shape a new narrative towards inclusive transformation that catalyses social innovation. My research presented in this thesis is the power latent in the narrative as captured through my story, the story of my culture, the story of FNB, the story of the CoPs and the journey on which this business embarks towards organisational transformation, called rebirth (Kirk & Miller, 2006).

Through these stories, one is taken into a deep realm of mental enquiry and historic and current observation towards interweaving theory, research and practice. This allows succinct levels of themes to emerge through my artwork, Figure 2.1, referred to herein as the Rebirth Mandala wherein multiple aspects of the metaphoric interpretations and succinct meaning are given. Lessem and Schieffer's (2012) 4Cs integral approach forms the foundation of this thesis and is outlined as follows: Call, Context, Co-creation, and Contribution (Lessem & Schieffer, 2012). My story was captured in Chapter 2 wherein I grounded to Call and presented the first C of my 4C integral journey. Chapter 3 takes me into my second C which is Context, and unlocks my cultural journey through the story of my culture, unlocking Southern heritage and awakening communal Rebirth.

## CHAPTER 3: The story of my culture, emergence and Context

*There is no alternative to global cooperation on the basis of our humanism: without it we are doomed...Botho-Ubuntu is far superior to modern notions of systematic interdependence because it carries the weight of ethical tradition with it.*

– Khoza (2011:27)

### 3.1 Introduction

In Chapter 3, I embark on an enquiry into the first C in my 4C integral journey which is Call and engage the issue of communal identity through the lens of culture (Sono, 1988). Within this Call, my cultural communal realities emerge, bringing forth indigenous as well as exogenous cultural influences, and the impact thereof toward informing communal cultural identity. The cultural stories emerge into cultural awakening, grounding community to Call, emerging into Context in cultural identity through the Southern relational path (Lessem & Schieffer, 2010). My communal, cultural stories and rich interpretations are framed through the Rebirth Mandala in Figure 2.1, and through this lens of cultural sense-making, a communal journey fusing into multi-cultural dimensions, unfolds. This journey translates into an organic transformational experience, moving from the reality of our communal past imprisonment into a vibrant dance of colour and cultural celebration as we pause to ponder meanings and interpretations captured therein.

Schein (2016:14) defines culture as that which the group has learned in its efforts to survive, grow, deal with its external environment and organise itself. Within the context of my communal reality, there is a need to re-engage and to be reminded of the gift of our indigenous culture divorced from the experience of colonisation (Chutumba, 2013). Culture captures a total way of life, and informs communal perspectives regarding the way things are done or the way towards being (Viljoen, 2015). Through the cultural story, the question of identity in communal relationship is explored as “relationships oblige growth, not regression, complexity, not simplicity and involve coming to terms with the tension of opposites which each party embodies” (Hollis, 2003: 90). National culture is the core in shaping cultural norms and defining meaningful values which define the way in which a community constitutes and frames identity (Hofstede, 1996). It is a well from which communal identity is shaped and norms are defined.

In this chapter, I present the story of my culture wherein my identity lies. The story of culture is rooted deep within my being from which I draw my Africanness and purpose. *Botho-Ubuntu*, an African concept of humanism is also unpacked and interpreted in this chapter (Mbigi & Maree, 1994). Certain African objects to which I have been exposed in my culture became very symbolic in my life and their significance for Rebirth is presented in this chapter. I further delve into the stories of my culture as a child born of a Zulu mother and a Tswana father by describing these tribal cultures and their respective heritage connecting them to Rebirth and practicing some of the cultural practices towards transformation both as self and community.

### 3.2 The story of my culture as seen through the lens of the rebirth tribal circle

The cultural story told in this chapter holds a rich legacy of visual story-telling interwoven into the 4C integral journey through the Southern path of community and reason (Lessem & Schieffer, 2010). It is a story enshrined in Southern cultural norms. My cultural story begins in the South, grounding

community in human and communal identity to Call. It emerges in the East, setting the communal Context, navigates to the North for communal Co-creation and effects in the West with Contribution (Lessem & Schieffer, 2014). My communal cultural story is a story of Africa referred herein as the South, its people, humanity, inheritance and vast legacy, interwoven with Southern symbols, storytelling, song, archetypes and rich proverbs. Penfield and Duru (1998:119) state “proverbs are metaphors that teach and are quotes from the ancestors.” This is a story of the uniquely rich Southern heritage captured through the philosophy of *Botho-Ubuntu* and celebrating the essence of the human spirit (Mbigi, 2005) and (Chitumba, 2013). The story of my culture emerges in the East, and awakens the communal story and reality towards its calling and purpose for being.

The story and communal journey told here navigate to the North wherein the community connects critical burning issues within the FNB case and cultural story, unlocking its value in diversity to cause inclusive transformation catalysing social innovation. This becomes the 4C integral journey which effects in the West wherein the community causes social innovation through the rebirth transformation journey to bring out new innovations (Chitumba, 2013). These innovations are grounded, conceived and birthed in the South and are a new value proposition to bring transformation within the domain of organisational change and development.

Within the context and impact of rebirth as organisational change and development journey, as well as the cultural story of FNB, I created the tribal circle, depicted below as symbol of the womb in the rebirth transformation journey which holds within it ancient African wisdom. Sow (1980) reiterates that conflict and change have been part of African societies for centuries and highlight the dynamic foundation of African Culture. Jung (1912: unknown) states, “The circle or sphere is another universal symbol.” In Figure 3.1 below, the universal symbol of the whole is illustrated.



**Figure 3.1:** Rebirth tribal circle designed by the researcher

The rebirth circle, depicted in Figure 3.1 above is also the tribal commune in which the community connects to engage open conversation to co-create its future reality in conversation and communion to reframe its cultural identity. Conversation is a powerful medium which grows awareness, and

connect parts and people that are separated (Bohm, 1998). In the tribal circle, the following questions of existence are repeatedly asked in conversation and to sharpen communal vision: (i) Who? (ii) What? (iii) Where? (iv) Why? (Kets de Vries, 2001). The tribal circle and the symbols used in the case organisation will be discussed further in Chapter 7, wherein the rebirth process is presented. Wheatley (2005) contributes by highlighting the importance of making connections and co-creating a shared vision. The Institute for the Future, Innovation at the intersection of Technology and Sustainability (cited in Viljoen, 2008) discusses the importance of a conversation as follows:

“Conversation is at the heart of the new inquiry. It is, perhaps, the core human capacity for dealing with the tremendous challenges we face. To engage in great civilization, we need to ask questions that matter. We cannot afford to spend our time on issues that can’t hold our attention, that don’t touch our hearts. The culture of conversation is a different culture, one that could make a difference in the future of our world.”

- (Good Company, 2006:5 cited in Viljoen, 2008:7)

In the rebirth tribal circle the community is propelled through systems thinking to interrogate its primary archetypal nature to critically analyse archetypes to embrace and dispel. An archetype is defined by Jung (1960: np) as: “an unlearned tendency to experience things in a certain way;” he also goes on to say, “the archetype has no form of its own, but it acts as an organising principle on the things we see or do.” (1960: np). Archetypes in REBIRTH therefore become a tool for identifying patterns of communal disintegration and patterns of communal growth and learning. Mutwa (2013:309) said: “You are beholding the knot in the cycle of Life, and it is here that you experience the truth of the philosophy that Life is but Death and Death is but Life. One only lives to die, and die to live again.”

Within the story of my culture is a fusion of my cultural heritage integrating the Setswana and isiZulu cultures, interwoven within a larger community of Southern communities. Within these cultures, lies a rich history of rulers and great warriors who overcame and conquered much adversity, leading their nations to freedom and re-igniting identity. Symbols, archetypes, colour, rituals and cultural practices are core to my culture, and it is within this context that I wish to delve deeper into my cultural story and its rich heritage as a platform upon which the rebirth transformation journey can be framed. Within the context of culture are stories which are important as they are the glue that binds the community together, empowering and enabling it to unleash its communal value towards a required shift (Lessem & Schieffer, 2009). Figure 2.1 depicts my communal cultural and national story and holds the indigenous Southern lens as core while embracing the exogenous East, North and Western lenses within the larger frame.

This is demonstrated in the two worlds contrasted within my artwork, Figure 2.1, referred in this thesis as the Rebirth Mandala suggesting that for inclusive transformation to be realised, a REBIRTH and congruence of both the inner and outer worlds is necessary. Jung (1969) defined a mandala as a graphical representation of centre, being oneself. He furthermore states the following regarding the mandala, “Only gradually did I discover what the Mandala really is: Formation, Transformation, Eternal Minds, Eternal Creation” (Faust, II). And that is the self, the wholeness of the personality, which, if all goes well is harmonious, but which cannot tolerate self-deceptions (Jung, 1954). This becomes my, and the community’s, call to re-engage our core and uncover and rediscover our centre through a

journey and interpretation of the Rebirth Mandala towards whole systems transformation. What follows is the interpretation of our journey through the lens of the Rebirth Mandala to investigate our communal story. Stories are important as they keep the communal spirit alive, evolving from its past into the collective future. De Pree (1989:82) shares the following on stories: “Without the continuity of story-telling and the messages they contain from the leadership of the group, the people of any tribe or corporation will forget who they are.”

The Rebirth Mandala and cultural artwork in Figure 2.1, depict the matriarch’s chair and throne which represent kinship, direction and order in three tiers; ascending and descending, within a window that stretches into the heavens. The role of leadership within the Southern norms represents strong values used in the rebirth transformation journey, and symbolises the spiritual trinity within the community’s diverse cultures and holds the womb of the tribe whilst calling on the community to engage a new narrative in re-entering the tribal village to experience Rebirth towards new hearing, seeing, sensing and transforming identity in an inclusive manner. Within this cultural context, embarking on the 4C integral journey therefore requires communal commitment to engage a Rebirth experience translating into an awakened consciousness and grounding to communal calling.

The prison cell in Figure 2.1 is a distant memory fading away from which new life and energy emerge. The bars represent solidity, grounding to core in the Southern path of community and human relations. The brightly coloured tribal walls are the creative voicing of the community and depict its strength, uniqueness, boldness and open-heartedness, a quest for a dance with life. The prison bars hold both the shadow and light sides of the communal reality and conditions towards being (Southern core) and becoming (Eastern calling). The dark colours depict the decomposed parts of the community’s life and reality calling for a rebirth conception and awakening. There is a communal call to bury the decomposed parts, reconnect to burning desire to cause a transformative rebirth, heritage and legacy. The chain depicts the tribal circle and the call to work through each concentric part to untangle the communal past reality towards a new reality. Within the rebirth mandala are blotted spots of black and white which hold new emergence symbolising awakening and illumination through re-entering conception in the tribal circle which represents the womb of the tribe.

### **3.3 Unpacking *Botho-Ubuntu* – a Southern philosophy and basis of my culture**

Mbigi and Maree (1995) cited in Mokgoro (1998: 2) note that *Botho-Ubuntu* may be described as:

“a philosophy of life, which in its most fundamental sense represents personhood, humanity, humaneness and morality; a metaphor that describes group solidarity where such group solidarity is central to the survival of communities with a scarcity of resources, where the fundamental belief is that *motho ke motho ka batho ba bangwe/umuntu ngumuntu ngabantu* which, literally translated, means a person can only be a person through others.”

Interpreted fully this means the individual’s whole existence is relative to that of the group: this is manifested in anti-individualistic conduct towards the survival of the group if the individual is to survive. It is basically a humanistic orientation towards fellow beings. Through the notion of *Botho-Ubuntu*, the gift of diversity and connectedness with self, other, community and the whole in harmony with creation and the wider ecosystem is acknowledged as vital (Chitumba, 2013).

The story of my culture is also captured in symbols, richly spoken in diverse forms and rich in colour (Viljoen, 2015) and (Laubscher, 2013). The symbols become a powerful learning tool that ignites an ecological integration of whole sensing and systems thinking within the human ecology and vividly illuminates purpose with vision from deep within. Viljoen (2008), states that in terms of systems, one should focus on relationships, rather than on parts and on patterns, and not on events. The field of systems thinking acknowledges the web of interconnectedness that enables life in the universe and the role of individual consciousness in that web states the web of interconnectedness (Viljoen, 2008). The story of my culture is an interconnected web of wisdom expressed through rich cultural stories, symbols and colour and emerges into exogenous knowledge of human relatedness as valuable science for engaging today's complexity within the frame of ecological transformation (Mbigi, 1995).

### **3.4 My Zulu cultural heritage, its symbols as a conduit towards communal cultural identity and grounding to Call**

The Zulu cultural heritage is a heritage of the Nguni people made up of the following groupings: Zulu, Xhosa, Ndebele and Swati. The Zulu culture is therefore larger than one single grouping, and represents a multicultural fusion of divergent groupings, each with a vast heritage. It represents a greater whole within various groupings of communities which exist and co-exist. The Zulu culture derives from a warrior tribe and nation. It is a culture of visionaries, travellers and a resilient people who grew from a small clan to becoming a ruling nation led by a fearless archetypal warrior in Shaka Zulu.

Shaka was a fearless warrior archetype determined to reclaim his authentic identity, of his people and their freedom (Mutwa, 2013). In his visionary quest, he led innovations and developed the short, large-bladed stabbing spear and the means of employing it lethally. He also developed the 'chest-and-horns' tactic of surrounding enemy forces and annihilating them. Within eleven years, he had accumulated and trained an army of fifty thousand warriors, and defeated all the local clans. Shaka built a huge kraal called *Bulawayo* – the 'place of the persecuted one'. This great kraal established the pattern for all other royal kraals. Although a great strategist, visionary and shape-shifter, Shaka became consumed with power and had a deep hate for colonialism.

This colonialism hatred brought out the shadow side of Shaka Zulu's archetypal nature. Shaka's reign was ruthless and brutal, with both commoners and those in high office being put to death for little or no reason. This set a chain of battles won and lost in the history of the Zulu nation, a history which no doubt, is recorded as the pride and identity of the Zulu people. Shaka had the courage to create; he has been called a military genius for his reforms and innovations (Von Kapff, 2011). He developed the *iklwa* spear and *isihlangu* shield, which were used as great powerful tools during the warfare in South Africa. His warrior ship led to transformation in the continent as he built a Zulu army which killed two million enemies.

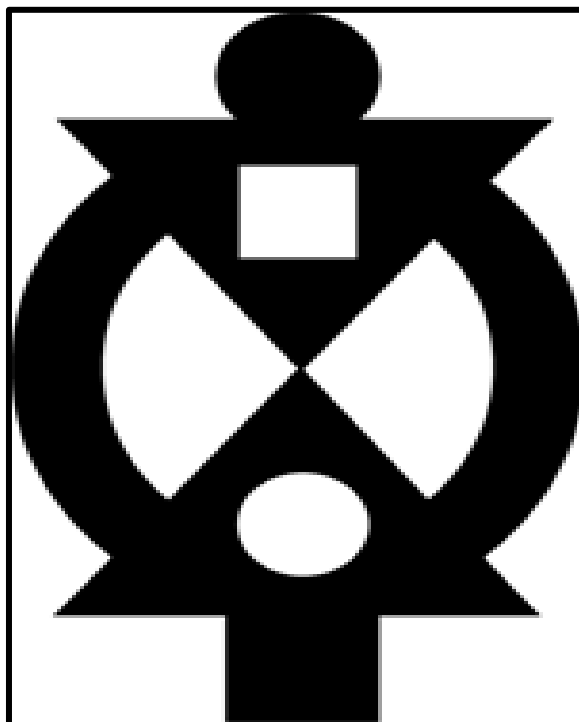
After the second Boer War, the Zulus were to feel the first stings of the white man's rule, and were segregated. They became subject to strict control over their movement. The Union of South Africa was established in 1910 and all the provinces were moulded into that Union. In 1948, the Afrikaner-dominated National Party succeeded in gaining control of parliament and set about to disenfranchise those people of colour who still had the vote. The policy of separateness (Apartheid) was continually

reinforced and embellished with the Job Reservation Act, the Mixed Marriages Act, The Group Areas Act, The Immorality Act, the Pass Laws and many more legislated acts (von Kapff, 2011). The Black nations were split into homelands, with the Zulus in kwaZulu (place of the Zulu), comprising thirteen fragmented areas to entrench the illegitimacy of the womb of apartheid (Von Kapff, 2011). In 1990, in the face of chronic internal resistance and international sanctions, all the previously banned black political parties were unbanned, race laws were abolished, and political prisoners were released.

In 1994, the first democratic elections were held, and the homeland of kwaZulu was dissolved and the entire province of Natal was renamed KwaZulu-Natal (Von Kapff, 2011). The Zulu cultural story is a story of deep spiritual worship and connectedness to the divine. In this culture, the spiritual realm is interpreted and experienced in different forms comprising religious worship, ancestral worship and consulting of mediums in the form of sangomas. In an article by Martin (1999) Mutwa had this to say, "Anyone who studies humanity with love, with understanding, and with care, recognizes the fact that there is a shining God which is struggling to be born within each one of us." He was speaking about his tribe, the Zulu. In this culture, spirits are thought also to exist in animals, the forest and in caves; reinforcing identity and our interconnectedness. Within these varying beliefs are symbols, archetypes and unique ways of expressing the art and practice of spiritual worship.

To the Zulu, it is the spirit that is important, not the body. In the Zulu culture, there is no fate as every event is perceived to occur for a reason. Within this culture is the *inyanga*, who is the doctor of the tribe – more correctly, the naturopath. Each *inyanga* trains his son and the information is passed on from generation to generation (von Kapff, 2011). Umndeni (family) in the Zulu culture includes all the people living in a homestead who are related to each other, either by blood, marriage or adoption. An African proverb, from Akan of Ghana says, "A clan is like a flowering shrub, it blossoms in clusters." Von Kapff (2011) says drinking and eating from the same plate were, and still are, signs of friendship. It is customary for children to eat from the same dish, usually a big basin. This derives from a "share what you have" belief which is part of the *Botho-Ubuntu* philosophy conceptualised by Mbigi and Maree (1994), which is based on a sense of community. This culture is my sense of wholeness and identity in community.

Figure 3.2 below captures the principle of *Botho-Ubuntu*. *Boa me na me mmoa wo* (Ghanaian) meaning, "Help me and let me help you." This Adinkra symbol is West-African and embodies the essence of community and understanding that an individual does not stand alone (Ofori-Ansa, 1978). It further encompasses the essence of community and value in diversity to cause a holistic shift within and without.



**Figure 3.2: Adinkra: Boa me na me mmoa wo (Ghanaian symbol)**

In Figure 3.2 above we see the representation of the whole, depicted through two interlocking triangles representing an integral whole within a communal circle, representing the ecology and wholeness of the philosophy of *Botho-Ubuntu* (Mbigi & Maree, 1995). This philosophy of integral wholeness informs and drives the underlying value systems within my holistic culture as well as its interrelated cultural practices. In the Zulu culture, Inkosi is the tribal chief who is an arbiter; an object of reverence and the figure head for the entire group for which he is responsible. Family is a strong connecting force in Zulu culture, and it is the duty of a woman and the community to bring up the children (Setiloane, 1986). Children are taught from an early age to respect elders and the Zulu grandmother is an object of reverence and exerts considerable influence, representing the respect given to the wisdom of the ages (Koka, 1996). This cultural practice of respecting elders reinforces the African proverb which says: *“Wisdom is not bought”- Akan of Ghana*. Within the African multi-cultural context and dynamic children are slowly introduced to family chores at an early age to instil in them the value of challenging work and responsibility in their homes and it is part of acknowledging their respective roles and being accountable for collaborating teaming and engagement.

Names given to children are symbolic and inform the rights to passage, especially in a boy’s life. Names can also denote events taking place at a certain period. Names are symbolic and taken seriously. Naming and how it occurs inform identity. In the Zulu culture, what you wear tells a story about who you are (Von Kapff, 2011). A single maiden wears only a short grass skirt embellished with beads whilst an engaged girl will cover her breasts and allow her hair to grow. Our dress holds within it the rich and diverse narrative of our stories, as well as our identity. A married woman covers her entire body to indicate that she is taken and wears a thick cowhide skirt (isidwaba) that has been treated with charcoal and animal fat. Over this skirt, another cloth in red, white or black may be worn. Over her breasts, the woman wears a cover decorated with beads with a message understood only by her

husband. The most impressive adornment is the hat which is constructed with grass and cotton that are sewn into the hair. Cow tails (amashoba) are worn on the upper arms and below the knees by men, to give the appearance of greater bulk to the body.

Isinene is the front apron, consisting of coin-sized circular skin patches sewn closely together to add weight and cover the male genitals. Ibeshu is the rear apron made from calf skin (taken from still-born or dead calves). The ibeshu of a young man who is involved in active pursuit is knee length whilst that of an older man is ankle length. A headband is only used by married men. The leopard is revered as the king of predators and only those of an elevated social position wear its skin (Mbigi & Maree, 1995). An induna may only wear one headband, but the king may wear as many as he wishes. The injobo is a long animal skin worn on the hips. In my culture; *“A chief is a tree on which all birds sit” – Sotho of Lesotho and South Africa proverb.*

Polygamy in the Zulu culture indicates a man’s social standing, wealth and virility. The first wife will initiate the acquisition of further wives as they are a help around the house. The head wife, along with the grandmother exerts a powerful influence in the family. Traditionally, a reed mat is used as a sleeping mat with a wooden neck rest as a pillow. Lobola is the practice of paying the future father in law with cattle for a wife. If the wife is deficient in any way, the father in law is expected to make a replacement available or refund some or all the cattle. The cattle are used to recompense the father in law for the expense of her upbringing and the loss of her services (Von Kapff, 2011). Cultural norms expressed herein re-inforce the notion and philosophy of *Botho-Ubuntu* which is a cultural basis for inculcating fair exchange in every aspect of managing relational dynamics. This notion of fair exchange in relational dynamics is uniquely African and a value proposition that could be inculcated and embraced in all organisational forms which facilitate relational dynamics.

Respect is rooted and enriched in every Zulu being and cannot be disregarded in any event. Sawubona (I see you) is the Zulu greeting, with the response: Yebo, sawubona. Excessive eye contact is provocative and is avoided, particularly between women and men. The handshake is meaningful. Firstly, there is the conventional shake, followed by then clasping thumbs around thumbs and finally another conventional handshake is a symbol of a deep acknowledgement of one another. Presenting a gift is accomplished by using the right hand only with the left supporting the right arm at the elbow to show that nothing is hidden. In the Zulu as well as all African cultures everything is interconnected and there is an African proverb which captures this by saying: *“One who damages the character of another, damages his own” – Yoruba of Nigeria.* This proverb reinforces my cultural practice and grounding in the Southern relation path of community (Lessem & Schieffer, 2010), premised on the essence and rich philosophy of *Botho-Ubuntu*. My Zulu cultural story is therefore inter-communal and inter-cultural reconfirming the Southern notion of humanness and ecology.

Crafting in the Zulu culture is highly acknowledged as it allows people to explore their creative energy through a variety of materials which are used to construct vessels. Clay, grass and telephone wire are used. However, where clay is scarce, baskets are made by using the split leaves of the iLala palm. Patterns are created by soaking the leaves in a natural colorant made from dung or other natural pigments; therefore, I made a mandala symbolising this heritage and its inherent colourful nature within which each colour bears deep meaning. Zulus, as it is in all other cultures, are fond of singing as well as dancing. These activities promote unity at all the transitional ceremonies such as births,

weddings and funerals. All the dances are accompanied by drums and the men dress as warriors. Dancing and singing connect to the core and inculcate unity.

Zulu folklore is transmitted through story-telling, reciting praise poems and quoting proverbs. These explain Zulu history and teach moral lessons. Praise poems (poems recited about the kings and the high achievers in life) are becoming part of popular culture. The Zulu, especially those from rural areas, are known for their weaving, craft-making, pottery and beadwork that access creative senses as a way of being as depicted in Figure 3.3 below. A Yoruba proverb states: *“The young cannot teach tradition to the old.”*



**Figure 3.3:** Mother and daughter celebrating their gifts through dance, the Mvula (rain) family

In Figure 3.3 above, dance is a medium to rebirth in identity and is performed during celebrations and sometimes at funerals to celebrate the life that was lived. There are various dances which represent different meanings. In the Zulu culture, drums are an integral part of most festivities and dance (Le Baron, 2005). In many African cultures spirituality is of significance as it connects to one’s spirit and is viewed as essential for healing. It also helps in breaking through feelings of oppression through dance (Monteiro & Wall, 2011). *The Hausa of Nigeria say: “When the music changes so does the dance.”* Per Monteiro and Wall (2011):

“Traditional African dance is connected to ritualistic and spiritual healing practices, and addresses a range of ailments. They further state that the underlying belief is that community, mind and body empower the individual and the group. Ultimately, given their holistic structure, rituals benefit the society in many layers as they play an integral role in socialization, expression and communication; help to build and maintain a healthy sense of self system; and also offer an alternative cathartic experience for not only individuals but the community as a whole.”

African beadwork as seen in Figure 3.4 below is a work of labour and love symbolising Africa’s natural beauty and innovative values and a symbol of identity, pride, heritage and community. Each colour and pattern has different meanings. The multiple bright-coloured beads become an item of treasure worn for every occasion.



**Figure 3.4:** Mvula's traditional Zulu wedding display

In Figure 3.4 the Zulu beadwork, in the form of skirts, jewellery, traditional hats and ornaments, is all hand- made by its females. These items are displayed to show their rich creativity, and are rooted deep in their culture. The Zulu beadwork symbolises the innate human spirit (Von Kapff, 2011). I end the story of my Zulu culture with the Zulu King's royal standard, clan names and kingly praise which are the heritage of kinship, warriorship and power.

“Isithakazelo sakwa Zulu: Zulu omnyama ngenkani. Ondlela zimhlophe. Nina baka  
Nkayishana ka Menzi. Nina baka Malandela ka Luzumane. Nina baka Phunga no Mageba.  
Nina abaphuza umlaza ngameva. Ndabezitha!”<sup>2</sup>

The story of my Setswana culture follows.

### **3.5 My Setswana cultural heritage and its symbols as a conduit towards communal cultural identity and grounding to Call**

The Tswana cultural heritage, which is sometimes referred to as the Western Sotho, are a heterogeneous group, including descendants of the once great Tlhaping and Rolong clans, as well as the Hurutse, Kwena and other small groups. Setswana, being the language of the Tswana culture is closely related to seSotho, and the two are mutually intelligible in most areas. The Batswana are divided into the following tribes: Bahurutshe, Bakaa, Bakgatla, Bakwena, Bamalete, Bangwaketse, Bangwato, Barolong (Seleka and Tshidi), Batawana, Batlhaping, Batlharo and Batlokwa. There are approximately twenty-five totems (sing, seanô or serêto), which crosscut tribal boundaries. The Batswana are known for their large, nucleated villages (Schapera, 1957). These large compact villages

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<sup>2</sup> Praises of this nature maintain the efficacy of their meaning only as spoken in their indigenous African language

or towns are associated with the aridity of the areas and the necessity of settling near reliable water sources and under chiefly power.

In the past, chiefs could control the movements of people, the allocation of land and the timing of agricultural activity through their centrality in rituals performed to ensure agricultural fertility. Town or village residence is the norm, but the Batswana disperse their economic activities, and typically have temporary residences at their agricultural fields and near their grazing land (Schapera, 1957). The Batswana have long been tied to the South African industrial economy and have purchased items that formerly were made locally. These include most metal goods. In the past, men worked in metal, bone and wood; women made pots, and both sexes did basket work. These skills were often passed from parents to children. Some men still specialise in skin preparation and sewing, usually for trade, and men still make some wooden items, such as yokes for livestock.

In Northern Botswana, women make baskets, many of which are exported. Women build "traditional" Tswana huts, whereas men specialise in European-style thatch and "modern-style" houses. The latter requires highly-specialised skills (Pilane, 2002). As in much of Africa, children fashion toys out of fence wire, tin cans, old tires and almost anything they can lay their hands on. Growing up, children help in the fields, and girls help their mothers, especially with looking after younger siblings. Batswana women had little opportunity for wage employment. The available jobs were largely as domestics and on white-owned farms. Traditionally, the right to use (but not to sell) agricultural land was inherited patrilineal by sons, and women received access to agricultural lands as wives. Closely related agnatic kin tended to have fields in the same general area, which facilitated cooperation. Pasture land was in theory communal, but often areas were associated with groups. In Botswana, most people live in the districts (former tribal reserves), where most land is held in common.

Traditionally, Batswana marriage is a process marked by several rituals and exchanges between the two families. No single ritual or exchange is definitive in confirming the existence of a marriage. Bride-wealth (bogadi), typically consisting of the exchange of eight head of cattle was the most elaborate materially and ritually, but it often occurred several years after the couple had been cohabitating, after children had been born, and occasionally after the death of the wife (Pilane, 2002). Church and civil marriages have begun to replace traditional marriage, which has removed some of the ambiguity in marital status, but many people who observe "modern" marriage procedures still conduct traditional rituals and pay bride-wealth. Some tribes have prohibited bride-wealth. Bride-wealth is almost never returned, attesting to the fact that its primary function is to affiliate children.

In my Setswana culture, both sexes nurture children, but their care and upbringing are largely the responsibility of women and other children, particularly girls (Kalule-Sabiti, 1994). Grandmothers devote much time to rearing children. It is often believed that a young mother is not ready to care entirely for her own children, and elder female kin take on the responsibility – either by keeping children with them or regularly intervening and training the young mother. Batswana refers to being traditionally from Botswana while Setswana is the language spoken by those with Botswana descent. Setswana also refers to cultural practices of Batswana who developed powerful chiefdoms in the nineteenth century. Batswana were internally ranked into dikgosana (royals) and badintlha (commoners). Immigrants were absorbed into bafaladi (the tribe) and boiata (non-Batswana clients). High rank brought both privilege and responsibility, for instance, kgosi (the chief) could command

matimela (stray cattle), labour and first fruits from the harvest, but he was also expected to display largesse to his followers (Pilane, 2002) and Schapera (1970).

Maloa (customary law) and legal protocol are highly developed among Batswana. Less serious crimes can be dealt with by the families of the parties involved. If a problem cannot be resolved at that level, it is taken to the kgotla (Pilane, 2002). Kgotla refers both to a group of people and the place where they meet. Each ward has a kgotla, over which a headman presides. Villages have a central kgotla, and the central kgotla of the tribal capital is presided over by the chief. All men, and, in the late twentieth century, women, may speak at the kgotla and advise the chief. If a case cannot be resolved at a minor kgotla, it moves up the system and may eventually be tried at the chief's kgotla, which, in Botswana, is sanctioned by government. Many Batswana were involved, and some lost their lives in the anti-apartheid struggle. Violence accompanied the dismantling of Bophutatswana in 1994, as some leaders were reluctant to relinquish their power (Schapera, 1970).

Although Batswana received Christian missionaries in the early nineteenth century, pre-colonial beliefs retain their strength among many Batswana (Schapera, 1970). Missionaries brought literacy, schools and Western values, all of which facilitated the transition to migrant wage labour. Most Batswana today belong to African Independent churches that incorporate Christian and non-Christian practices, beliefs and symbols. Most people have some knowledge of medicinal plants (Schapera, 1970). Dingaka (doctors), however, are specialists in healing and magic. There are many ceremonies to mark lifecycle events: these include birth, the end of the three-month post-partum confinement, several marriage ceremonies, bride-wealth payment and death (Schapera, 1953). Increasingly, funerals have become the most elaborate life-cycle ritual.

In the past, initiations into adulthood were elaborate ceremonies lasting a few months, in which girls and boys were taken separately to the bush in the winter. There are few specialised arts in the Setswana culture. Beadwork is practiced by some. Compounds and houses are often beautifully designed and painted. Pina (song) and pino (dance) are highly-developed forms of artistic expression. Choirs perform and compete on official and ritual occasions. Lyrics are composed that offer narratives and critiques of the past and present. The Batswana have an extensive local pharmacopoeia. Medicines (ditlhare [trees] or melemò) are used for treating ailments in humans and animals, for fortification, protection, fertility, injury and making rain (Schapera, 1953). Batswana seek medical help from several sources, including clinics and hospitals, traditional practitioners and Christian healers. Western medicine is universally acknowledged for its ability to treat symptoms, but other healers are frequently sought to address the causes of illness and misfortune. Death is usually considered to have both natural and supernatural causes.

Seretse Khama was the chief of the Bama-Ngwato tribe in Bechuanaland (now Botswana). During his time as president, Botswana had the fastest-growing economy in the world. It was a period of much civil strife in Africa, but Botswana remained free from war and corruption (Spies, 1993). In his last years, he played a vital role in Southern African politics when he negotiated the future of Zimbabwe and South West Africa/Namibia and developed a vision of a Southern Africa post-colonialism and post-apartheid (Spies, 1993). This was seen to be a key part in the development of the Southern African Development Community that has since been founded. Khama died in Gaborone, Botswana on 13 July 1980. Before his death, however, he did see Zimbabwe's independence and the launching

of the Southern African Development Coordination Conference (SADCC) in April 1980. 1 July, his birth date, is celebrated as a public holiday in Botswana as Sir Seretse Khama Day.

The quote below is Seretse Khama's view on history. It was taken from a speech made at the Universities of Botswana, Lesotho and Swaziland in 1970 (Tlou et al., 1970:314).

"... in a very positive way, to despise ourselves and our ways of life. We were made to believe that we had no past to speak of, no history to boast of. The past, so far as we were concerned, was just a blank and nothing more. Only the present mattered and we had very little control over it. It seemed we were in for a definite period of foreign tutelage, without any hope of our ever again becoming our own masters.

The result of all this was that our self-pride and our self-confidence were badly undermined.

It should now be our intention to try to retrieve what we can of our past. We should write our own history books to prove that we did have a past, and that it was a past that was just as worth writing and learning about as any other. We must do this for the simple reason that a nation without a past is a lost nation, and a people without a past is a people without a soul."

The lessons I've learned and continue to learn in my lifetime from both cultural norms are significant in remodelling and conceptualising a Rebirth transformation journey grounded in the South and historical heritages of its diverse cultures and rich infinite wisdom. These lessons unlock the value proposition of the South grounded in community and the value of tapping into the human spirit as modelled in the rebirth transformation journey. The journey to Rebirth through my story and the story of my culture becomes an impregnation which propels me into the need to transform self, other, community, society and the larger ecosystem. This impregnation through lessons learned in my culture causes deep need to re-enter the womb and re-engage the conversations of identity, humanness, Southern values and their wisdom, and how these are now relevant constructs for designing a new model framed within the thesis as a rebirth transformation journey towards a new lens and narrative in organisational change and development. Rebirth therefore is breathed and birthed from deep within my soul.

### **3.6 Conclusion**

In Chapter 3 of this thesis I presented the story of my culture, integrating within it my past, present and future. This chapter described my, and my community's, burning desire to engage my calling to embark on a 4C integral journey and interrogate a new cultural identity. Within the cultural story are succinct and divergent narratives which ultimately depict the essence of the human spirit and call towards authentic identity. It is within this context that a Rebirth towards transformation is awakened. The stories integrate the existential tapestry of human being and becoming, and are a quest to transcend whole being through a REBIRTH transformation journey grounded in the Southern relational path of reason and community. Within the multi-faceted stories, lies the second C (Context) of the 4C integral journey (Lessem & Schieffer, 2009).

Chapter 4 will focus on the second C, Context, and takes us into the story of FNB where the community embarks on the 4C integral journey towards contextualising aligned understanding of critical issues within this business unit which ultimately became the burning issue for a rebirth transformation journey to be deployed.

## **CHAPTER 4: The story of FNB Private Wealth Client-Servicing, its culture and burning issue**

### **–Context**

*As we strive for the renaissance of Africa, we need sound, committed and compassionate leadership. Leadership predicated on an authentic understanding of our history, culture and contemporary challenges... We have to meet prevailing global challenges from within our worldview and proceed to action from our own authentic possibilities based on the culture and competencies of Africans themselves.*

-Mbeki (as cited in Nussbaum et al., 2010:29)

### **4.1 Introduction**

In Chapter 4 I will cover the second C, being Context, of my 4C integral journey as described by Lessem and Schieffer (2009). In this chapter I unpack the Private Wealth Client-Servicing story through the First National Bank's (FNB's) story, which becomes the case study and the work-based challenge. I also identify burning issues which become the focus for this BU to embark on a rebirth transformation journey. Within this context, the origins and background of this business are given. The business objectives and the challenges facing this business unit are also unpacked. The focus and parameters used in addressing these challenges are then given. As part of the background it will also be shown how the FirstRand Group, which houses the FNB brand and its subsidiary First National Bank (FNB), have built their legacy on cultural values of innovation, and through this have shown remarkable success.

This chapter clearly positions the reasoning for the business to decide for this BU to undergo a rebirth transformation journey, giving due context to the business problem and the way in which I addressed it. This chapter looks at the challenges I faced in resolving the FNB Wealth Client Servicing case and how applying the experiences and learnings of self and community brought me to the point of being able to apply a rebirth transformation journey in the organisation. I thereby linked my lived experiences to that of my culture into the organisation, which became the key in embarking on an integral journey towards inclusive transformation by catalysing social innovation. Finally, it will also be illustrated in this chapter how challenges faced by this BU required significant shift in cultural adoption for the business to transform systemically. Within the story therefore, I connect and integrate the three-tiered process required for transformation within an organisational change and development process being self, community, organisation and society. The case of FNB in the form of a story will be presented below.

### **4.2 Background**

#### **4.2.1 Origins of FirstRand**

In 1987 GT Ferreira, Laurie Dippenaar and Paul Harris (being in time the founders of FirstRand Bank Ltd) established Rand Merchant Bank (RMB), as provided by the First National Bank Archives Department (The Archivist, Lower Mezzanine Floor, 2 First Place, Bank City; Johannesburg). In establishing this bank, they recognised that culture had to drive strategy for any business to succeed. As a result, they strongly drove a culture of innovation and entrepreneurial spirit in their people. The basic premise behind their thinking was that to stay ahead in business, it was critical to innovate continually, and that innovation was best driven by those on the ground through a philosophy of owner-manager culture.

In 1998 Rand Merchant Bank began negotiations to acquire an interest in Southern Life, a subsidiary of the Anglo-American Corporation. The reason for the approach by Rand Merchant Bank was that Rand Merchant Bank had established a life company under the name Momentum Life and they were now looking to expand these interests within the financial services; the insurance sector, in South Africa. The Anglo-American Corporation, however, wanted to divest all their financial services interests in South Africa at the time, and therefore was only prepared to make the deal, subject to RMB taking over all their South African financial services interests, which included FNB.

While the founders did not know much about retail banking at the time, having previously only been involved in corporate and merchant financing and investment, they nonetheless agreed to the terms and the financial services interests of Rand Merchant Bank Holdings and Anglo-American Corporation. These were then merged to form FirstRand Bank Limited, the biggest financial services company in South Africa at the time. FNB therefore became a wholly-owned subsidiary of FirstRand Bank Limited. This journey resulted in greater focus on creating a sustainable advantage, not only as a counter to competitors, but also in support and development of their people. This resulted in a culture of succession planning and raising leadership from within the group, and thereby strengthening the owner-manager culture.

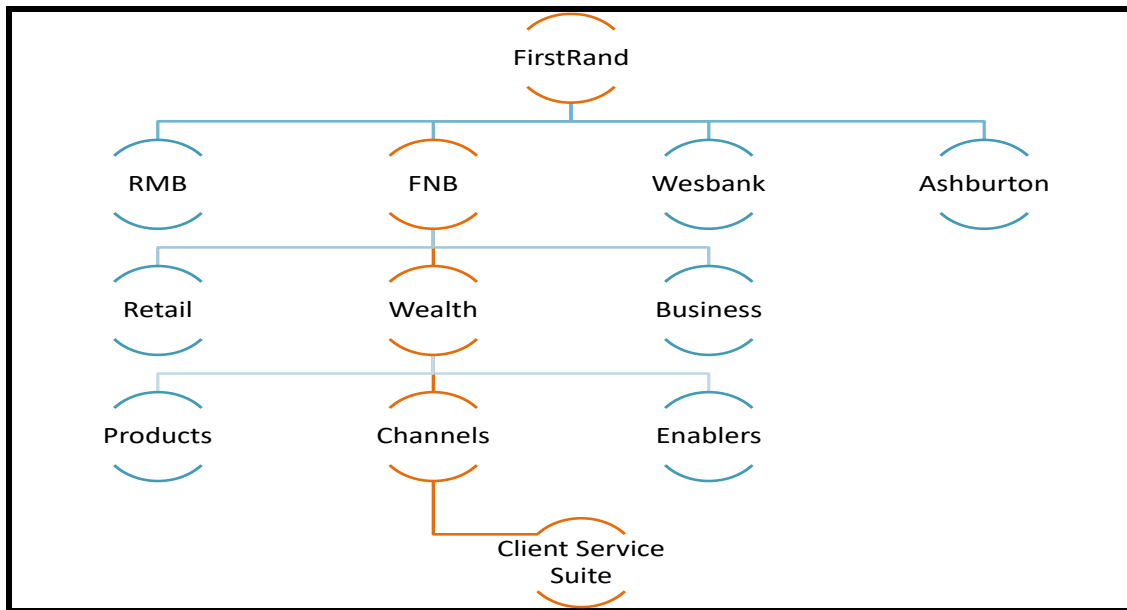
The succession planning, however, did not holistically address the diversity within the business, and although the FirstRand Group was perceived to be one of the preferred businesses for which to work, there remained a great need for adopting an inclusive people framework. The original RMB slogan reads: "Traditional values, innovative ideas" (company philosophy statement). While this remains the vision statement for RMB even to date, the rest of the FirstRand group has in many ways adopted and applied this same core vision, with values of truth, honesty, respect and accountability as key tenants for driving culture. Innovation is a key strategic pillar to be lived and applied by all, and not just the responsibility of a few. It therefore forms part of the business strategy, while at the same time it is also being lived as a core company value.

Innovation has helped mobilise open, honest communication and collaboration across the group that is important for ensuring strong, on-going progress in all spheres of its business operations. FirstRand and its group of companies know and understand that the biggest mistake that a company can make is that the team sit back and admire what has been achieved. They know that the only way to keep winning is to keep changing and transforming, and to remain game changers in the industry. This is not easy, but is inherent in the culture of FirstRand, to the extent that the new FNB CEO Jacques Celliers, when taking over from Michael Jordaan in his acceptance speech stated: "Remain humble and continue to provide excellent service to our customers. We should continue to work hard, focus on growing our business and not take our eyes off the ball." This is an emphatic testimony of the inherent culture found within the FirstRand group.

#### **4.2.2 Business objective**

Within the greater FNB is a division called FNB Wealth. As depicted in Figure 4.1 below, there is a business unit within FNB Wealth, which forms the case on which this study is based, and within which I worked. This unit could carry both the objective, subjective view and experience which both were to inform the research of this study. This BU is called FNB Private Wealth Client-Servicing whose mandate is to grow client loyalty and increase scalability by providing a servicing platform that will result in an unparalleled client experience. Within this mandate is the need for driving client experience and

innovation to grow an efficient market share within the highly competitive wealth client market, where client demand for superior service has peaked. The Corporate Executive Board (CEB) Customer Contact Leadership Council, research document is titled: “The Next Frontier of Rep Performance.”



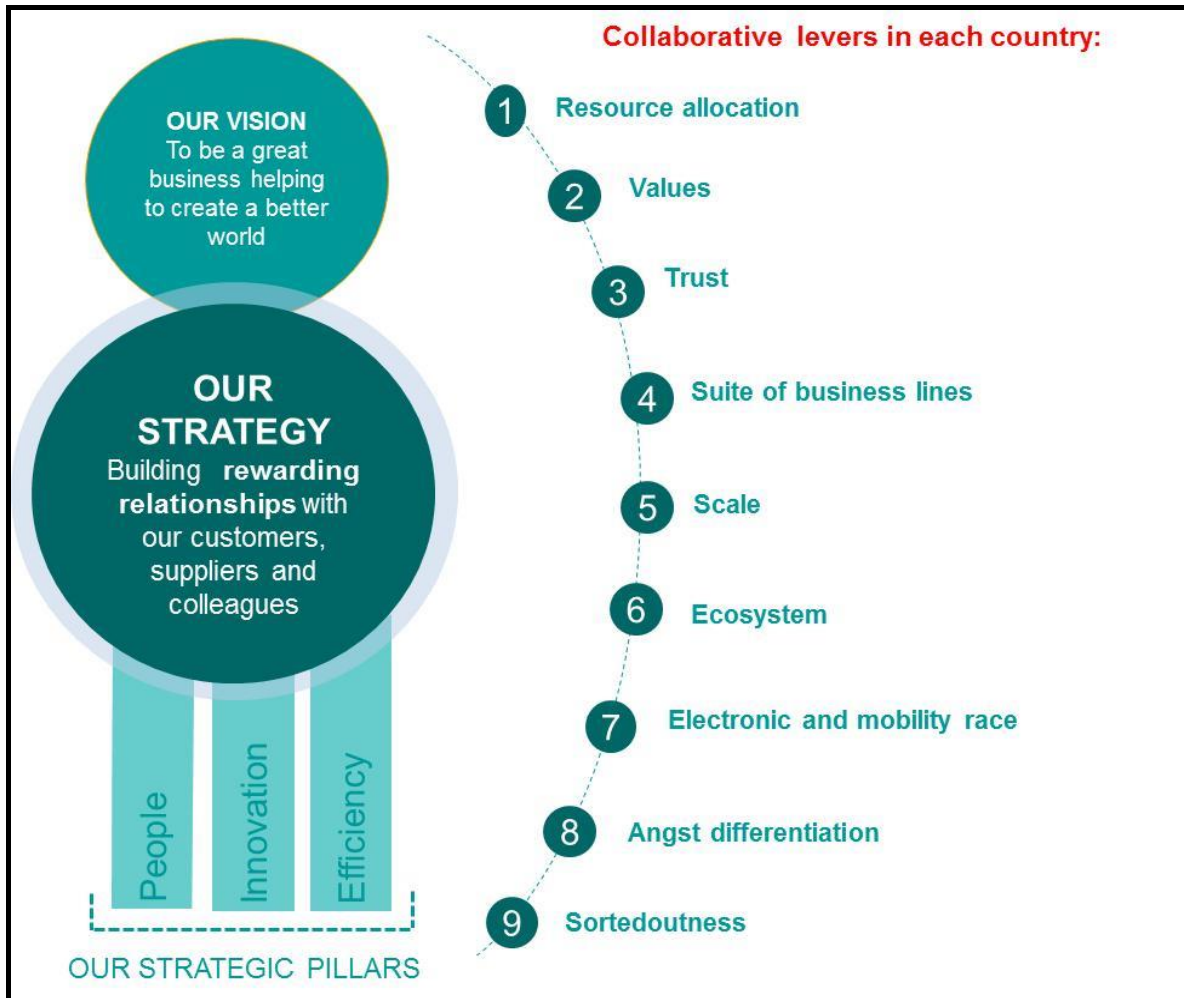
**Figure 4.1:** FirstRand organogram, redrawn by researcher

Figure 4.1 above illustrates the various brands housed under the FirstRand Group, divisions, business units and specifically the Private Wealth Client-Service Suite within which this research was conducted. Coming to work for FNB Private Wealth Client-Servicing was not out of choice, but as time would show, a calling. Having previously worked in the Information Technology division of FNB Wealth where my role was directing and managing change in terms of project implementations, a move to restructure the area, created a move to an operating business area. At the time, I had been providing some guidelines and input to the business leader for FNB Private Wealth Client-Servicing, and he had indicated a desire for me to join his team. Not knowing a lot about the area or its challenges I chose to move there as part of the business restructures, and therefore found myself part of this BU.

Looking at, and understanding the business challenges faced by leadership, it was clear that there was poor leadership thinking, obstructed vision and no strategic direction. This meant a disengaged human capital with low self-esteem. There was need to drive innovation, and processes which stifled creativity, high operations and finance costs were rife. Systems needed for inclusive decision-making regarding maintenance and servicing of customers were lacking. The management and leadership in FNB Private Wealth Client-Servicing needed to appreciate the value of driving and living values in the 2025 vision so that it might become the thread that systematically connected the different pieces of its entire business system to achieve greater effectiveness as a systems process. The 2025 vision is underpinned by a strategic objective, supported by nine key levers. It is the FNB vision formalised by Jacques Celliers, the new CEO succeeding Michael Jordan, whose previous vision had been “g2G1in3”, meaning going from good to great (Collins, 2001) in three years. The strategic objective for 2025 then is to achieve 20% year-on-year growth, thereby taking FNB to a R25 billion profit in 2025.

FNB’s 2025 vision consists of three components being, Vision, Strategy and Strategic Pillars which support and hold the vision in being a great business in helping to create a better world. These

strategic pillars are people, innovation and efficiency. Furthermore, for the 2025 vision to be realised, Jacques Celliers identified nine collaborative levers which, if each of the set outcomes are successful, will make FNB a world-class organisation. The 2025 vision and nine collaborative levers in each country are illustrated in Figure 4.2 below.



**Figure 4.2:** FNB 2025 Vision (Celliers, 2014)

In Figure 4.2 above the levers identified by the FNB CEO become key drivers in delivering on the 2025 dream and in covering the following aspects: Resource allocation (Lever 1 in Figure 4.2 above), which denotes a need for FNB to apply its scarce resources carefully, and where it is most likely to achieve the greatest gain for the organisation in reaching its vision. In this case, there is a continuous requirement for FNB to be testing and re-examining the prioritisation of projects as still fundamental and the right things to be done in achieving its business objectives.

There are values (Lever 2 in Figure 4.2 above), within these levers which remain key driving sources of accountability, doing what is right, staying true and being respectful. Being the best and preferred bank through values is attributable to trust (Lever 3 in Figure 4.2 above), which is a key component of any organisation. Trust is a valuable and important lever for FNB as it aims at always delivering on its promise. It is through a trustworthy relationship that FNB will be able to garner the trust of both clients and suppliers and achieve its vision. The suite of business lines (Lever 4 in Figure 4.2 above), talks to the need for FNB to make sure that they operate business functions in the place where they best

belong, and ensure that those businesses within the owner manager culture do not start developing their own departments or functions that already exist, and operate somewhere else in the group. The aim therefore should be for businesses to hold each other accountable to better deliver the best possible product in each business line.

The scale (Lever 5 in Figure 4.2 above), is important and, to some extent, addresses the requirements set out by the Wealth Client-Servicing business. The objective of this lever is that wherever FNB looks to build an operational solution in a business, it must, at the same time, always consider the application of that solution across the whole enterprise, and should not be selfish and consider it for that business unit only. This ties back to trust, values and resource allocation levers, and requires businesses to consider all solutions, and not just the one new solution when putting it together.

Likewise, ecosystem (Lever 6 in Figure 4.2 above), talks to itself and it is the lever FNB wants to use to expand its market share. Essentially in this lever FNB must continue to look at offering services, not only to their clients and suppliers, but also to offering the FNB value proposition to clients of clients, suppliers of clients, clients of suppliers and suppliers of suppliers. FNB should bank the whole ecosystem, so that in any transaction done, the payment moves from one FNB account to another FNB account. Following with the electronic and mobility race (Lever 7 in Figure 4.2 above), addresses the fact that in today's modern world, efficiency and leverage are best achieved through technology. FNB is no different, and looks at driving the electronic channels and their capability hard to serve clients better, faster and more sustainably than before. Angst differentiation (Lever 8 in Figure 4.2 above), refers to the processes that are applied throughout the banking industry.

The banking industry is underpinned by many regulations and controls, and thus banks require clients to pass through several checks and verifications before they can even talk to them, and only when they have passed through several further checks and validations will they be able to have more products. FNB aims at achieving all processes to be built with the client in mind to help take angst out of the process by making use of the angst lever and to use technology and systems within FNB to better understand clients and to better deliver solutions and offerings to clients.

This angst differentiation means that if FNB systems can score clients on behaviour and that behaviour shows poorly in respect of credit, then it becomes important for FNB not to offer the client a loan, since the client will think he or she can get it if they want it. However, later when it goes through further assessment the loan will be declined. So too, if a client has a credit card stolen, FNB should be the first to call him or her to replace the card and cancel the old card. FNB should not wait for the client to call. The aim, therefore, for FNB is to make the clients feel safe and that someone is on their side.

The last lever is Sortedoutness (Lever 9 in Figure 4.2 above), which addresses the systems and processes in FNB, but within this context, the lever is a greater focus on keeping the housekeeping clean. This means that FNB aims at working harder to make sure that the requirements from an industry or regulatory environment are appropriately appraised and always complied with. Often these are very tedious and administrative, and may so easily be ignored or forgotten, so this lever really tries to keep everyone honest and mindful to the fact that if the obvious, boring task of closing a window at night is not done, there may be severe consequences later for which FNB would only have itself to blame. The above levers are important in ensuring that the greater FNB 2025 vision is realised and as such, it becomes critical for division and business units to align their visions to that of the FNB

brand. This now becomes an opportunity for FNB Private Wealth Client-Servicing to step up and embrace the 2025 vision.

#### **4.2.3 Contextualising the challenges for FNB Private Wealth Client-Servicing**

This case study is focused on FNB Private Wealth Client-Servicing, part of the FNB Private Wealth segment, within the greater FNB, a division of the FirstRand Bank Group. This case study seeks to demonstrate that although the FirstRand Bank Group, and more specifically FNB, is a business built on a solid foundation of entrepreneurial spirit and a culture of innovation, this philosophy is not necessarily fully inculcated within all business units across the FirstRand Group of companies. FNB Private Wealth Client-Servicing, being one of them, was facing several business challenges, which required a new consciousness towards an organic and ecological shift in mind-set, culture and people practices moving towards achieving its goals towards the greater FNB 2025 vision.

Within FNB Private Wealth Client Servicing two strong and sometimes competing brands namely, Rand Merchant Bank Private Bank (RMBPB) and FNB Private Wealth (FNBPW) are housed. To contextualise some of the challenges, it is necessary to understand the legacy of these brands within the FNB Private Wealth Client-Servicing business. The predecessor of the FNB Private Wealth Client-Servicing business was the RMB Private Bank Client Service business; this was a small call centre environment (made up of only 42 people) which was established to deal with transactional service requests for lending clients, such as making payments, providing statements and issuing cards. The reason for this was that at the time of being established, RMBPB was primarily focused on their lending business, and more specifically on a product, called a single facility, which essentially combined the characteristics of a home loan, with the functionality of a transactional cheque account. The objective therefore was to have a service area that could field and execute on mundane client requests, while their lending specialists remained in the field selling.

The RMBPB Client-Service team had historically been in a remote site, away from the main private-banking business that they supported. Over time this had resulted in the business and its people often being excluded or devalued in terms of their contribution to the Private Banking value proposition. This devaluing may have been their exclusion from business team events, exclusion from important strategic presentations and updates. Often the only time that they got to see senior leadership was by video or email correspondence, whereas the rest of the private banking team sitting at the main offices were regularly in contact with senior leadership and were kept abreast of the business strategic direction. Although it cannot be substantiated, it was common “legend” in the team at the call centre that you were more likely to see senior RMB PB leadership if you were sitting in Cape Town, than if you were sitting just up the road in Randburg. This became a burning issue within this business unit, highlighting the issue of identity, human belonging, dignity and purpose for existence.

In 2011, the FNB Private Wealth business made some changes. Key to these changes was the strategic intent to bring a better focus to client relationships and service. Thus, the sales and service model strategy was re-engineered to bring about a more customer-centric methodology to how the business interacted with its clients. As part of this it was decided to merge the roles of lending specialists and banking specialists into a new role called, Private Banker. Clients would be assigned to Private Bankers, so that every client would have a Private Banker relationship. To ensure scalability, it was also decided that all mundane service requests of any nature should be directed through a central, non-face-to-face channel.

As a result of the above identified needs for change, the FNB Private Wealth Client Service Suite was born. The leader, who at the time, was responsible for the RMB Private Bank Client Service team was appointed to take this on. This essentially entailed rebuilding of the area with two brands, the FNB PW and RMB PB brands, servicing two separate client bases, but with the same technology, innovation, people and systems platforms. The purpose in setting up the business was to create sustainability by establishing a level of service quality that would drive client loyalty through service satisfaction and scalability of service to clients. A key goal in achieving this was to move away from the tag of “call centre” and rebrand the business unit’s identity to that of a service suite.

The FNB Private Wealth Client Service Suite team was to be established from new, while the RMB Private Bank Service Suite would continue as it was. However, because of this merging of a new team with a long existing team, the baggage that existed within the RMB Private Bank Service Suite team was now carried over into the new FNB Private Wealth Client-Servicing team. This inherent baggage resulted in dehumanising the FNB Private Wealth Client-Servicing operating team. The human capital talent had been constrained since inception of both the original environment and followed through into the new FNB Private Wealth Client-Servicing team. As evidenced from the fact that there were often very few opportunities for consultants to move to other roles in the business, most staff churns involved consultants leaving the company.

Engagement levels in this area were a challenge, as could be seen from the internal People Pillar Survey (PPS) carried out annually within FNB (see paragraph 4.5.1 below, dealing with People Pillar Survey in more detail). The People Pillar Survey is a survey carried out by an external company, The Corporate Executive Board Global Consulting Services (see Appendix A for detailed survey questionnaire). The People Pillar Survey is an annual survey conducted within First National Bank among all its employees to obtain insight into engagement levels of its employees within the Group. In this survey, all employees in FNB are asked to participate, but it is not compulsory, although it is encouraged, and participation rates have stood at over 80% for the past five years.

Due to the perceived negative outlook of the employees within this business unit, the business often undertook inconsistent initiatives that did little to solve these challenges in an inclusive manner, and only served to provide for interim relief and feel-good experiences that provided short-lived improvement to the area. The business generally regarded employees within FNB Private Wealth Client-Servicing as having a lower standard in terms of skills and competence. The environment was a low-end call centre or processing hub, with little value to offer to the relationship with the client or bankers. The business therefore did not see the need to allocate budget to uplift the people or the process and technological skills and resources in this area through either training or transformation. A few people wanted to work in this environment and most of those working there had aspired to “get out” as soon as possible as they perceived this environment as inferior and devaluing to their career aspirations, attaching a prison metaphor of “doing time” while in this environment.

A low role grade was also applied, which consequently meant that for these roles the salary range was on the low end and was therefore in reality aimed at people without qualifications or elevated levels of experience. Consequently, leadership was expected to employ cheap, administrative and mostly unqualified people into the environment. This only further entrenched the inferiority mind-set, and ensured that the possibility of innovation and change being owned encouraged and driven out of this

business unit was low or non-existent. Added to this was the fact that the people attrition rates were high in comparison with other business units within FNB, but were in line with typical call-centre businesses all round. It then became clear that in people's dehumanised minds, change meant moving to another role outside the area or worse, outside FNB. However, even then, as depicted in the monthly Human Resources staff files, they would in nine out of ten cases only be moving to a similar role elsewhere in the business or at another company, which would be administrative and operational by nature.

The human dynamic which exists within FNB Private Wealth Client-Servicing also involves the inherent, unspoken tensions between long-serving RMB Private Bank consultants who generally do not hold a university qualification and the new, inexperienced consultants who are split between both brands, but who are highly qualified and see their contribution as a foot in the door into FNB, as taken from interview transcripts of new candidates. The paradox and polarities within this human ecology challenge created the ability of this environment to manage change cohesively and therefore to provide cutting-edge client-servicing resulting in innovation.

#### **4.2.4 Contextualising the people challenges**

##### **4.2.4.1 People legacy**

The two brands within FNB Wealth Client-Servicing, being the RMB Private Bank Service Suite and the FNB Private Wealth Service Suite maintained an elevated level of fierce competition existing over time between these two individually strong brands. This emanated from the greater group structure where the strong owner-manager culture subconsciously drove tough competition between the business units within the holding group. Add to this the subconscious context that the RMB brand was essentially created by the group founders (Ferreira, Dippenaar and Harris), while the FNB brand was acquired by RMB when FirstRand was formed.

It was perceived that the people legacy might to some extent have started becoming a weakening factor as the ability of these two brands to co-create and align their respective opportunities and strengths, would often clash. This showed itself in several ways, for example, when trying to get consultants from the FNB brand to assist the team on the RMB brand, the willingness to engage was poor and required undue influence to succeed. Add to this the need for the units to shift to a shared service model, running two brands across a single technology, innovation, people and systems platform, resulted in a need for re-aligning and re-focusing both brands to co-exist within a shared integrated culture with a view to strengthening reputational capital. The operating intention was to ultimately set up consultants who were able to represent both brands effortlessly, thus allowing for dual or cross-brand capability on technology, innovation, process and systems.

##### **4.2.4.2 People Perception**

The legacy of the servicing operation was a result of the Rand Merchant Bank Private Bank Service Centre having existed over a long period of time, with considerable experience and historic baggage but no tertiary qualifications. However, the First National Bank Private Wealth Client-Servicing team was still very new, having only been created and coming into existence recently. The team consisted of younger and more academically accomplished service consultants with no historic baggage, nonetheless perceiving the environment as not suitable to their status as qualified graduates. They were therefore mostly not fully engaged in facilitating the creation of a dynamic environment within which technology management could be achieved differently.

Generally, the level of qualification in the team at the time was varied, but relevant as could be seen from the human resources recruitment files. Some consultants had actuarial degrees, some had Investment degrees, many had finance degrees, and some also had post-graduate degrees in tax or accounting. The focus here was to employ people who were energetic and without baggage, in other words short working career and ambitious to grow their careers in banking. This would also make for a strong recruitment pipeline into the greater FNB business. The impact of the business moving to a shared-service model where one consultant could manage both brands simultaneously demanded a significant cultural and mind-set shift for this unit, before it could be expected to work. Having well qualified young consultants would help drive this as they would be more willing to learn, and would not have to be scripted as would be the case with consultants coming in without degrees.

The perceived dehumanisation of this business unit's people essentially had the effect of ultimately resulting in general employee behaviour being of a sub-standard nature, with people not willing to take responsibility for their actions, such as failing to attend training and then blaming lack of training as a reason for not following a required process (common reason used by employees in their defence when going through a disciplinary hearing, as contained in staff disciplinary records). Otherwise they were generally not living the FNB values, especially in the way in which they were treating each other and how they would treat other staff within FNB (expressed in employee 360 feedback reports). Professionalism was interpreted by management as being at a low point, and often this could be seen played out in dress-code discussions, the standard of emails written both internally and externally and the lack of engagement at management meetings, lack of willingness to take accountability for solving problems as opposed to simply listing problems for management to deal with after a meeting (covered in team leader records from team engagement).

Dehumanising employees consequently resulted in an overall low level of service excellence culture with a regular lack of commitment shown to go the extra mile for a client or a banker. This also played out in simple immature behaviour, such as management continually having to address the unreasonable noise levels in the environment, which would make calls difficult and the client experience poor service to entrench the environment as a production house or factory. In addition, and to a considerable extent because of the factors described in the preceding paragraphs, the greater FNB Wealth business raised doubts regarding this unit's capability to deliver service that would result in a seamless client experience during 2012.

The skills found in the area were of a low level, with very few of the consultants having completed a tertiary qualification, in addition, many of the consultants came from one or other retail call centre and thus brought with them the baggage of being scripted, order-taking, clock watchers. This made it very difficult for the FNB Private Wealth Client-Servicing leadership to drive productivity or a strategic roadmap for the greater good of the business. This in turn brought with it due disrespect and dehumanisation from the organisation's internal and external colleagues and leadership alike.

In the end, the FNB Private Wealth Client-Servicing team were regarded as a team fit to be considered only for menial, administrative tasks and had no financial system, people and technological budget or investment to grow in service and work competency or in enhancing their service platform. This invariably led to a downward spiral in performance and people engagement for this unit. Intellectual and spiritual knowing exists in the team and needs to co-exist to enable people to unlock potential. In

so doing, the multiple dimensions which constitute the human system are tapped into and engaged. The more FNB Private Wealth Client-Servicing permits itself to explore its spiritual quotient, the greater it can unlock new potential to bring balance into the universal ecosystem. This becomes FNB Private Wealth Client-Servicing's burning issue from which the researcher is mandated to provide a solution.

#### **4.2.4.3 Lack of leadership vision and purpose**

It became my opinion as Head of Organisational Change and Development that there was a gap in leadership within FNB Private Wealth Client-Servicing, with leadership not actually fulfilling the true leadership role of guiding, supporting and enhancing the FNB strategy. There was a definite lack on leadership's part to address technology, innovation, people and systems (Da Vinci Institutes TIPS™ framework) to enhance the business and drive it to be a leader in client service. Leadership acted more as transactional managers in the throes of managing a call-centre team. The model and process of interview used were based on the leadership circle culture pyramid, which helped me formulate this opinion as the person in charge. The leadership circle culture pyramid is a culture diagnostic tool for supporting leadership to understand elements in their culture which impact the environment negatively, and define actions they wish to take in achieving different results.

Leadership therefore seemed to focus more on driving process compliance and transactional volumes and consequently stuck to scorecard measurements as their employee discussion content, as opposed to thinking about addressing business challenges and looking for innovative ways of transforming the business, and indeed growing its people more effectively. Notably they did not have anyone to look up to and it could therefore be understood that as top process managers in their field, they naturally took to applying that in this environment. They did not look at inculcating leadership philosophy or leadership thinking into their environment and teams, but rather assimilated into the environment as opposed to creating a culture of uplifting the environment through innovation and performance. This meant they could not hold people accountable, therefore setting a precedent of unprofessional ethic and etiquette, with lack of governance and consistency. This resulted in a lack of ability for leadership to embrace a culture of learning in the environment.

To support technological innovation competencies, it is also important to formalise a culture of innovation to achieve openness regarding information sharing. Leadership should be accountable for supporting and modelling collaboration and empowerment as innovation learning from the core function that drives the CRSMP system and the business strategy. While organisations create a culture by proffering a vision and mission which underscore the importance of managing systems with awareness, the reality of creating cultural depictions that do not "see the bigger picture" could eliminate the possibility of associations with alternative views of the world (Field, 2000) and (Mbigi, 2000).

### **4.3 Lack of innovation thinking**

The ultimate purpose of a learning organisation is to identify creative exchanges through technology to produce optimal beneficial effects through financial manipulation and economic exploitation (Senge, 1993 and Viljoen, 2008). The challenge of the future is for creative leadership to recognise that finance-based organisations operate in a high-potential learning environment, which provides

the necessary stimulus and support for continuous learning and finance generation. It is through the pro-active participation of knowledge workers collectively that technological advantage can be achieved. This business needed to create the right context for innovation to take place to serve as further support and to be provided to other areas within FNB Private Wealth and the greater FNB. It had to improve client relationships both internally and to strengthen loyalty. It must enable an environment that thrives on change and therefore consciously move towards change, as well as pro-actively anticipating new technological changes that can be used as innovation strategies.

#### **4.4 Lack of Investment in building the unit**

Historically the FNB Private Wealth Client-Servicing business has always been in a remote site, away from the main private-banking business that they support. Over time this has resulted in the business and its integral technology often being excluded or devalued in terms of its contribution to the client-servicing value proposition. This has resulted in distrust and little cooperation for the FNB Private Wealth Client-Servicing technology team, and thus the human capital talent has been limited for an extended period as few knowledge workers wanted to work in this environment, and most workers had always aspired to leave as soon as they could. Something had to be done to build resilience in leadership and help facilitate interventions to bring about a mind-set of technological change (FNB Private Wealth Client-Servicing report, 2013).

In 2013, the shortcomings of the existing technological system needed to be explored and examined with a view to implementing modern technology to improve the response to client service integration and sustain client reputational capital as underscored in the 2025 strategic vision. The FNB Private Wealth Client-Servicing case addresses the introduction of the technological custodianship for the Customer Relationship Systems Management Process (CRSMP) within FNB Private Wealth Client-Servicing to gain profit through inclusive systems architecture through reconstruction and realignment of its servicing systems which include realigning its core systems: Hogan, Fusion, Siebel and CRM Dynamics to thereby have an inclusive and highly effective client response system.

To set context, Hogan is the core mainframe banking system for FNB and essentially holds with it all basic client and transactional data across all core banking products, being cheque, home-loan and cash investments. Fusion is a front-end system which integrates both the Hogan capability and the telephony functions, to provide a simple, yet effective application for a consultant to manage transactions while on the phone to a client. It has most of the Hogan functionality, but is linked to a telephony platform and is presented as a banking application to the user. Siebel is a multi-level system which was employed in FNB Wealth to act as a customer relationship management system.

The Siebel system, however, was first implemented within FNB by the FNB Business division and in doing so was never built on an enterprise basis, but rather was mainly scoped to resolve FNB Business issues. Thus, the system never really proved effective within FNB Wealth. It was a system that FNB Private Wealth Client-Servicing was forced to implement to align to the rest of the business, but it was not a beneficial tool. In time, the business could motivate to acquire a new, better customer relationship management tool from Microsoft, which was called CRM Dynamics, and this essentially replaced Siebel in FNB Wealth, with its initial pilot and launch platform being the FNB Private Wealth Client-Service team.

#### **4.5 Consequences – the burning issue or business problem**

In the preceding paragraphs, the background upon which the business operated has been set. From this more insight was gained into understanding the burning issues within FNB Private Wealth Client-Servicing beginning in 2012. The next section essentially summarises the business problems being faced by FNB Private Wealth Client-Servicing at the time until 2014 when a new business strategy was proposed and implemented.

##### **4.5.1 People Pillar Engagement Survey**

In 2012, the area was measured as having the lowest engagement score within FNB in the People Pillar Survey, a survey carried out by an external company, being The Corporate Executive Board Global Consulting Services (see Appendix A for detailed questionnaire). The People Pillar Survey is an annual survey conducted within FNB among all its employees to obtain insight into the engagement levels of its employees within the Group. The core objective of the survey is to measure employee engagement within the organisation with specific focus on leadership and management credibility and effectiveness.

The People Pillar Survey results enable the company to identify low scores for areas that require focus, trouble areas in terms of management and leadership weakness and create opportunity to affect action plans for business areas to improve on people practices. An important part of the process of conducting an engagement survey is providing feedback to staff and the action plans built from the various engagement sessions, with a view to listening and acting on staff input. The score came out at 46% for Private Wealth Client-Servicing which was far below the average expected for all business units within the greater FNB. The outcome of this result was evidence that a drastic shift was required and was recognised as such by leadership.

The Conference Board of Canada (2006:3) defined “Employee engagement” as, “a heightened emotional connection that employees felt for their organisation that influenced them to exert greater discretionary effort to their work. FNB Private Wealth Client-Servicing adapted this definition to encourage its people to become key role players within the business unit. It could therefore be argued that people engagement is a fundamental requirement for staff to willingly go the extra mile in their interactions and service to clients, which in turn would lead to a higher level of customer satisfaction and therefore a more loyal client patronage, which is the number one reason for any business success or failure.

Figure 4.3 below illustrates the results as depicted for all businesses across FNB. The FNB Private Wealth Client-Servicing result would have been contained within the FNB Wealth result and invariably would impact the overall FNB results as evidence in Figure 4.3 below.

# How did Wealth rank?

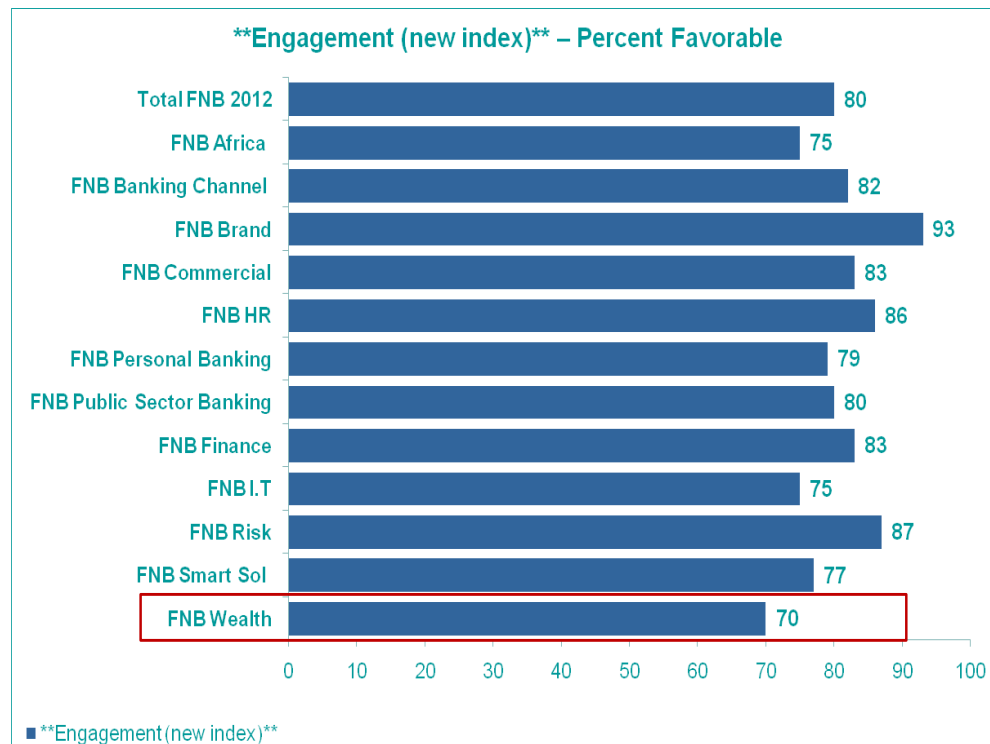


Figure 4.3: FNB People Pillar Survey results (FNB Wealth Presentation, 2012)

Figure 4.3 above illustrates that the leadership within this environment needed to make a substantial shift in terms of operating capability, scope and excellence, reinforced by its engagement measure, which was negative. Given the score of 46% contained within the FNB Wealth overall engagement score of 70%, there is no doubt that FNB Private Wealth Client-Servicing score played a key role in pulling the overall average for Wealth down to the lowest for all the major business units within FNB at the time. This becomes a critical burning issue for which FNB Private Wealth Client-Servicing is mandated to transform.

### 4.5.2 Fraud risk

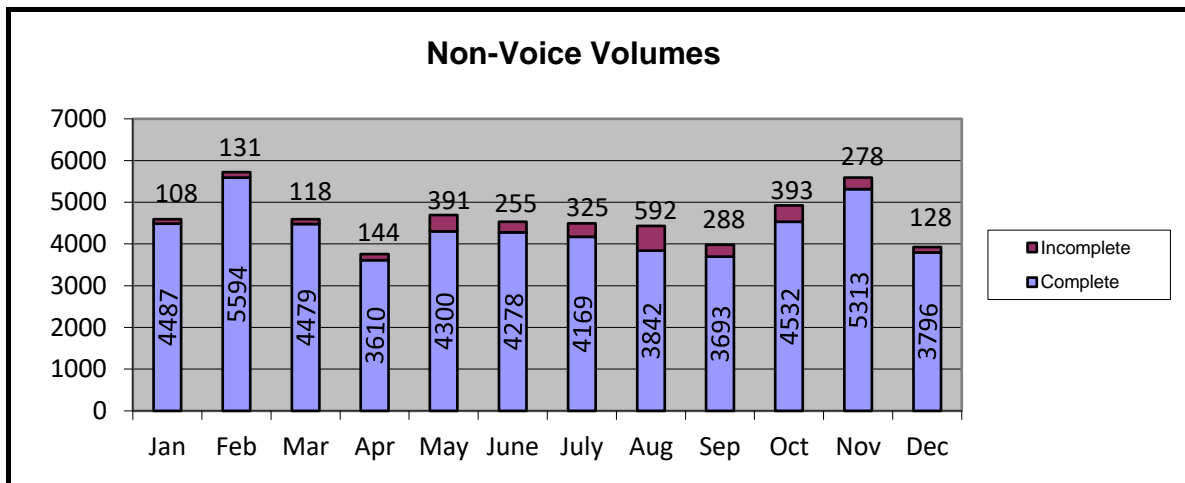
Between 2011 and 2012 the RMB Private Bank Service Centre became victims of fraud transactions valued at almost R10 200 000 (RMB Private Bank Risk and Audit Report, 2011 and 2012). In part the fraud was a result of poor execution on the part of consultants, in part due to poor systems, and in part due to a suspected internal source that was aiding the fraudsters, but which could never be identified. On a whole, the level of losses and the level of disciplinary hearings were high. Often these were justified as being so because of the nature of the work or the nature of the employees, or the nature of the roles. However, it was nonetheless concerning that so many instances could occur within a single business unit. The FNB Private Wealth Client-Servicing business unit therefore came under

focus in terms of their operational capability and indeed in terms of their value to the company. So too, trust between employees, managers and leadership became strained, and started to create a difficult working atmosphere for the environment.

#### 4.5.3 Moving from client channel to operating centre

Part of the FNB Private Wealth Client-Servicing model was to take all service functions away from bankers which would be a progressive process as the trust of the bankers and clients, who were accustomed to a more interpersonal service with the banker service model, had to be gained. At the same time the overall strategy was to get clients to shift to using the Service Suite directly as opposed to sending their service requests through to their banker. This was presented to levels of trust, firstly trust from the client to send or make the request to the Service Suite and secondly the trust from the banker that once he passed the client and or the request onto the Suite, the matter would be solved and the client responded to timeously.

Figure 4.4 below is a graphical statistic which shows the volume of service requests dealt with per month by the non-voice (mid-office) team. These are essentially instructions received either from the voice team or from the client via an electronic channel (e-mail or website) or otherwise by instruction received from a private banker. One of the objectives and functions for FNB Private Wealth Client-Servicing is to service and support the private banker and thereby indirectly service the client, through which they will create capacity for the banker to spend more time with clients in an advisory capacity as opposed to a service capacity. Figure 4.4 shows the number of such initiated instances, called service requests and splits them into those that are opened and completed and those not yet complete. In other words, it is a graphic representation of the number of service requests received for the month, measuring those that are closed versus those that are not closed, and therefore remain open.



**Figure 4.4:** FNB Private Wealth Client-Servicing non-voice volume for the period January 2011-December 2012 (as taken from FNB Business Reports – December 2012)

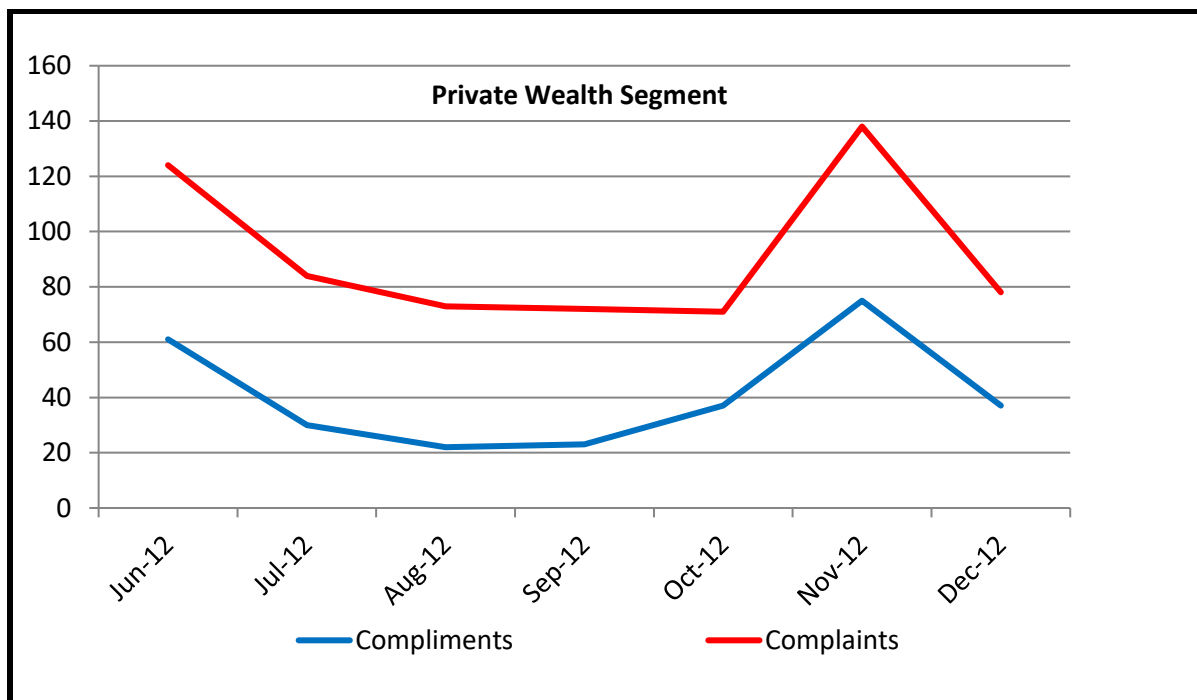
From Figure 4.4 above, volumes are inconsistent over the past, while the volume of outstanding requests have been increasing which would indicate slower turn-around times. It makes one wonder whether the volume volatility is not an indication of the lack of trust that the banker may or may not have in the servicing team to deliver to them and their clients. It is also a service level that has never

been agreed on with the greater business, but rather has been decided upon by the Service Centre team and upon engagement with the frontline Private Banker teams. It was clearly unrealistic in terms of the set turn-around times.

A key component of the new shift would be a reassessment and proper agreement of Service Levels for the Suite before one could expect buy-in from Private Bankers. However, this was difficult to achieve as bankers had an unreasonable expectation that turn-around time could be expected to be immediate, whereas this would not be at all possible in the new model as FNB Private Wealth Client-Servicing would look to drive hard proper controls and validations for every event, which was not necessarily the approach taken by bankers. Again, this drew into question the sorted-outness of FNB Private Wealth as it was clear that Private Bankers were executing on instructions from clients without due care and complying with laid-down validation procedures.

#### 4.5.4 Service levels and ethos

While client complaints reported were low, it was evident that there were several cases that were dealt with and could have been reported as complaints, but were treated as resolved queries. A sizable number of the complaints that were escalated were in respect of lack of service attention by consultants or caused by system failure, and often resulted in clients not wanting to deal with FNB Private Wealth Client-Servicing again. Figure 4.5 below is a depiction of all compliments and complaints received by FNB Private Wealth segment.

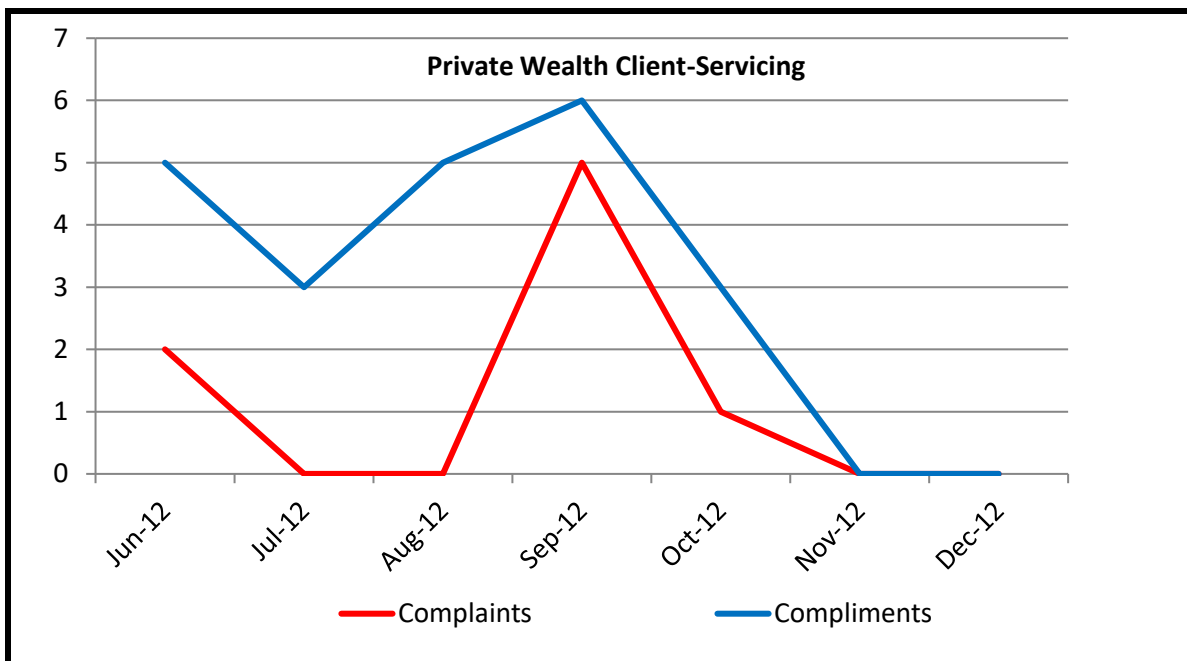


**Figure 4.5:** Compliments and complaints received by FNB Private Wealth segment June 2012 to December 2012 (FNB Private Wealth Client-Servicing business report, 2012)

Figure 4.5 above is a graph representation of compliments and complaints received by FNB Private Wealth at a segment level from June to December 2012. The compliments and complaints graphs reflect a correlated movement, but the number of compliments received was almost half of complaints received meaning that even at a segment level clients were dissatisfied with the service they were receiving from FNB Private Wealth. This level of dissatisfaction may be attributed to the

lack of service from Private Bankers and Client-Servicing as these are the only two channels through which service to Private Wealth clients is provided.

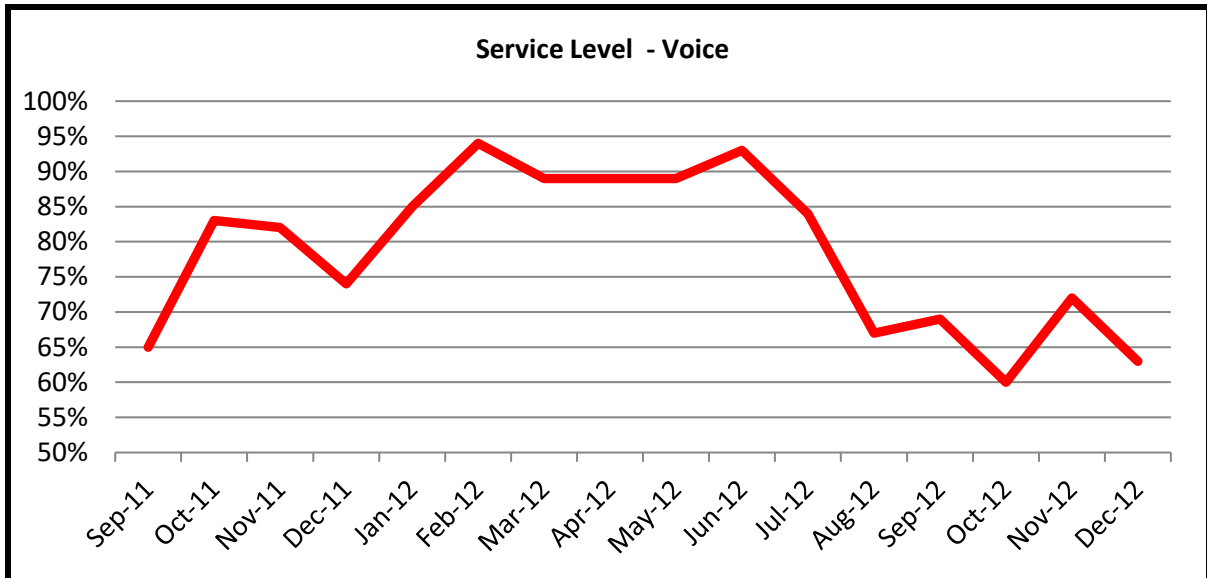
Figure 4.6 below depicts complaints and compliments received within FNB Private Wealth Client-Servicing, and illustrates a comparison with the figure above which considers both complaints and compliments from a segment perspective. It is without doubt that the number of complaints and compliments received in this BU are precipitated by a lack of reporting thereon from the Client-Servicing team and probably creates a false sense of achievement. Add to this the fact that complaints and compliments play a critical role, as measured by FNB Leadership in maintaining and advancing the reputation of FNB and its underlying business operations.



**Figure 4.6:** Complaints and compliments for FNB Private Wealth segment and Private Wealth Client-Servicing for the period June 2012 to December 2012 (FNB Private Wealth Client-Servicing Business Reports, 2012)

Figure 4.6 above is a graph representation of complaints and compliments received by Client-Servicing and shows how complaints have been generally above average and reasonably high for the segment while compliments are considerably lower. Complaints for Client-Servicing have been lower in comparison for the period June 2012 to December 2012. This therefore illustrates that if Client-Servicing continues to provide good service and transform to innovate, then complaints will be reduced, and compliments will increase leaving a great gap between complaints and compliments received at BU level.

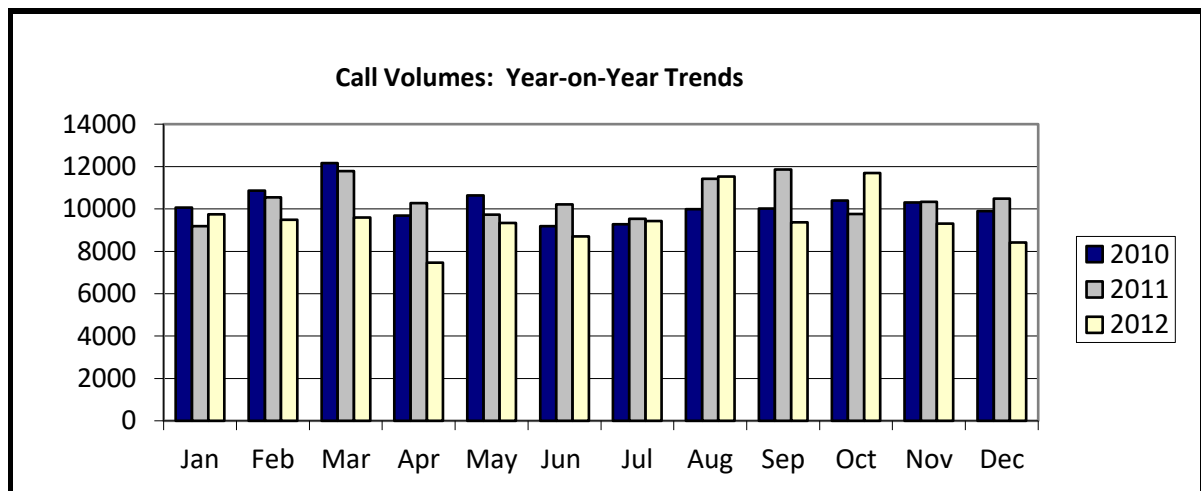
Within FNB Private Wealth Client-Servicing are two teams that receive and action client service requests. These functions are voice and non-voice (mid-office). The voice team receives an instruction by telephone initiated by the client calling in (real time) whereas non-voice is when the medium of the instruction is by means of other electronic channels but not telephone; mainly by e-mail, website or private banker. Figure 4.7 below, clearly shows that over the long term, service levels in FNB Private Wealth Client-Servicing (Voice) have been on a downward trend for some time.



**Figure 4.7:** FNB Private Wealth Client-Servicing service level for the period September 2011 to December 2012 (FNB Private Wealth Client-Servicing Business Reports December 2012)

From Figure 4.7 above, it is evident that action is required. Service level is measured as the rate at which the team meet their promise of answering 90% of their calls within 20 seconds. What is clear is that in the past achieving 80% and above was the norm, whereas it has continued to drop significantly averaging between 60 to 70%. Once again this could lead to a decline in reputational capital, while also putting client loyalty at risk. With the ever-decreasing service levels, the quality of service being provided to these wealthy clients is a risk on its own. The current organisational environment and culture may be the contributing factors towards these outcomes (Meek, 1988).

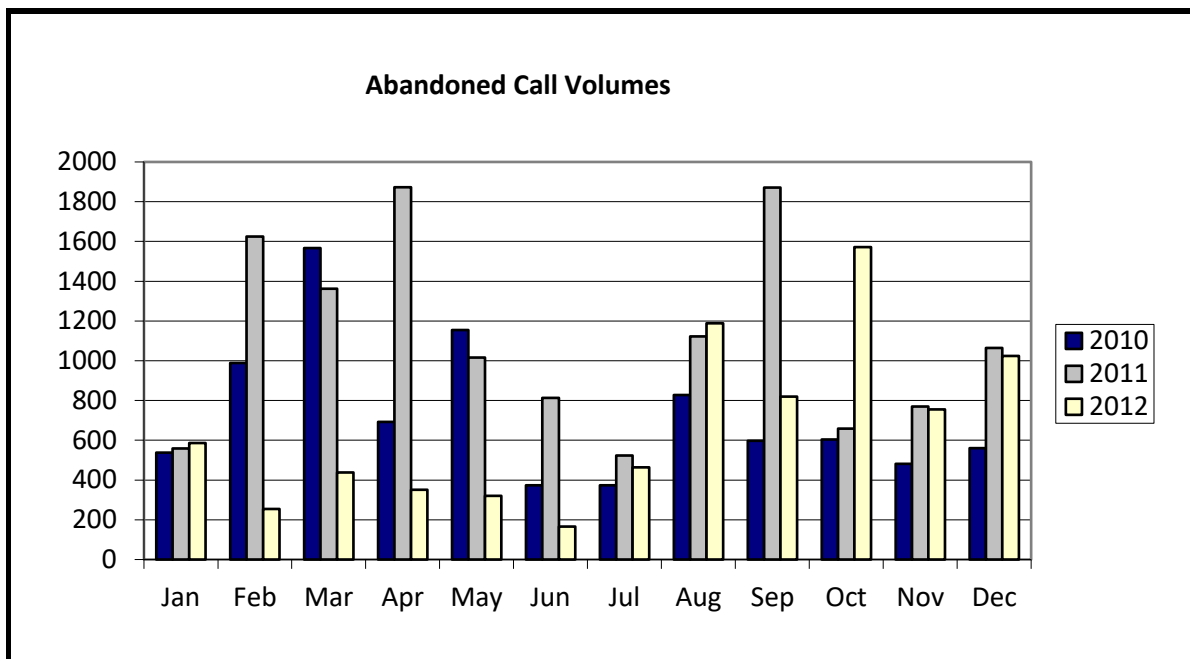
The correlation between the environment and its culture is critical for an organisation as it has a direct impact on staff morale, staff retention, errors, complaints and, ultimately, client service (Larson et al., 2004). FNB service levels dropped, and the call volumes were decreasing year-by-year as can be seen in Figure 4.8 below. This shows the adverse relationship between service levels and call volumes depicting lack of collective vision to transform.



**Figure 4.8:** FNB Private Wealth Client-Servicing call volumes for the period January 2012 to December 2012 (FNB Private Wealth Client-Servicing Business Reports December 2012)

Figure 4.8 above depicts the number of calls made into Client-Servicing for a three-year rolling period January 2010 to December 2012. Over this three-year period, call volumes only began to reduce in 2012. This may be attributable to the lack of service which clients were receiving from this BU. As a result, clients resorted to their Private Bankers hoping for better service.

Figure 4.9 below depicts the way in which the abandoned call level is increasing while volumes, as depicted above, are decreasing year-by-year (taken from FNB Business Reports of January 2010 – December 2012). Furthermore, this is a concern as calls are abandoned owing to a lengthy period lapse before a call is answered by a Client-Servicing consultant. This therefore results in the drop in service levels. One can see that over time the environment was struggling to uplift its service levels, thereby falling short of their objective to increase client loyalty.



**Figure 4.9:** FNB Private Wealth Client-Servicing abandoned call volume for the period January 2011 to December 2012 (FNB Private Wealth Client-Servicing Business Reports December 2012)

Figure 4.9 above shows an increase in the number of abandoned calls which essentially shows the number of clients that called into FNB Private Wealth Client-Servicing, but terminated the call before reaching a consultant. The present technological environment with increased competition and the rapid market entry of new financial services delivered through technological concepts presents further challenges of increasing loyalty towards a more in-depth understanding of the complex relationship between reputational capital and customer evaluative judgements. The construct of client loyalty differentiates conceptually between service quality and client satisfaction as the frequent determinants of customer loyalty. The construct of image focuses on the relationship between client satisfaction and service quality formulated with the technological process (CRSMP) to address customer relationships through a new servicing evaluation process.

#### 4.5.5 Lack of skills and development contributing to high staff turnover

People leaving, also referred to as people churn, was in relative terms high for this environment (taken from FNB Business Reports of January 2010 – December 2012), with most people leaving to go into roles that were external to the company. The rate of churn, however, was considered normal for the

industry, even though it remained constant with future churn to external employers, but at a lower rate. Lack of passion for client emanated throughout, and this stemmed from the following: Firstly the lack of belief in FNB Private Wealth Client-Servicing given the inhumane perceptions given them by the frontline banking team; secondly the lack of belief from the leadership who did not feel it was an important area and as a result was not willing to make the investment in the area required to improve skills and empower people as well as improve technology, and, thirdly the perception and lack of belief that clients subconsciously held about the service in this area resulting in the majority of clients being arrogant and dehumanising to consultants.

The mentality of operating a factory-type process (in other words a strongly regulated and scripted activity only) prevailed both with the Service Suite team and with the greater business which didn't allow for proper development and advancement of service functions being carried out by FNB Private Wealth Client-Servicing. This led to a point where a cumbersome, manual administrative process in the company would often be passed on to the Suite to look at fulfilling. The Suite in turn would welcome it and worked very effectively towards streamlining the process. Aiming for less client interaction is how the consultants began to condition themselves, being apprehensive and threatened when having to deal with live client interactions.

#### **4.5.6 Lack of accountability on the job leading to increased disciplinary actions**

Owing to employee standards not being met, several staff disciplinary actions were conducted monthly, and it had become common for staff to keep track between them as to what disciplinary action would be imposed next. So too it had become somewhat of a point of ridicule between the consultants as to who had the most disciplinary actions on record, almost like a leader board. This again alienated identities and the innate potential within the human spirit. The two loss incidents discussed in earlier paragraphs, as well as the rate of disciplinary hearings and churn for the area, were obvious signs of a serious lack of ownership and lack of accountability on the part of consultants.

Leadership and management were continually faced with challenges of what was wrong, but seldom was this done with an offer to solve the challenge. In time, leadership and management started to portray the same effects of offering problems as opposed to solutions. This meant that they were quickly excluded from key strategic discussions as and when these happened, and it led further to the reinforcing of the negative perceptions carried of the business. This also meant that over a prolonged period there was a lack of enforcement of certain key measurements, especially as these might not have looked very good for the area. As mentioned earlier in Paragraph 4.5.4 of this chapter, a lot of client complaints were not recorded at that time as complaints, but were rather classified as queries. While some of these may have been queries, in truth the lines between query and complaint had become blurred for this area.

#### **4.6 New business strategy**

In 2012, FNB Private Wealth business undertook a complete revamp of its client service value proposition. This comprised and housed both top ends of the market brands for FNB, being FNB Private Clients (now called FNB Private Wealth) and RMB Private Bank. These businesses had previously operated as separate business entities, each with its own CEO and executive committee, and to some extent their service and operating models varied partially from each other.

In respect of the client service front-end, RMB Private Bank for some ten years had operated a Client Service Centre, which mostly dealt with taking calls for clients who did not have the full banking suite of products. In other words, clients who did not hold the normal transactional banking products, but who did have a loan account in some form or other, which might or might not have had an element of transactional banking and capability attached to it as part of the product functionality. Clients who had the full product suite had the full suite of transactional banking products and were serviced by a high-end relationship manager. In contrast, FNB Private Clients operated without a Service Centre and rather directed all their servicing requests through a low-end Relationship Manager team.

In an assessment carried out by FNB, it was recognised that to achieve service with scale would require the movement of at least 80% of all client service requests through a cheaper centralised service model. This would require a major shift for the FNB team, but fortunately this infrastructure already existed in the form of the RMB Private Bank Service Centre. To this end doubts were expressed from Executive Leadership as to whether this environment could transform to the state required supporting the top-end client service requirements and needs, and how long it would take to get it to that desired state. This reinforced the perception senior leadership had of the environment, which ultimately played out in their lack of action in terms of inclusion, lack of investment in training, technology, people and systems and lack of recognition for their role in the delivery of service value to clients.

The business proceeded to develop a strategic intent to change the Call Centre profile as by, firstly, renaming the Centre to The Service Suite (*FNB Private Clients Service Suite and RMB Private Bank Service Suite*). This was designed as a precursor to creating and encouraging a mind-set shift from typical “call centre” mentality into a career aspirational centre of excellence, driven by service excellence and innovation, and a place where people could see an opportunity for growth and development, as well as recognition within the business and secondly by increasing the learnership budget for the Service Suite. This was designed as commitment from leadership to invest in the organisation’s most valued asset – the people, to create knowledge balance between technical and behavioural skill with emphasis on developing cognitive and behavioural skill that shapes leadership in becoming and driving innovation into the future. There were now improved resources for training on internal systems and policies, and more bursaries available for people to embark on self-study that would be of benefit to both the employee and the organisation.

In time, the rebirth transformation journey would become part of this investment; thirdly by employing mostly tertiary qualified people to bring new knowledge and drive continuous improvement, as well as changing the Suite, to become a knowledge hub. The shift here required a re-assessment of the role and a review of not only the role grading, but also to the salary ranges applied for that role. Without this investment, the role would still not have been able to attract tertiary qualified talent; fourthly to become the talent pipeline for future Private Bankers and Specialists, and therefore create a pipeline from which to build succession planning to attract and retain best talent.

Part of repositioning the role and attracting young talent was to be able to make the promise of a prominent and exciting career path. For the first time in 2013, the Client-Servicing team was now working with other business partners within the greater FNB and FNB Private Wealth to establish a recruitment pipeline within defined parameters; fifthly to invest in the underlying technology platforms of the “new” Suite to drive innovation. The leadership had previously withheld any spending

on technology to such a degree that the old call centre had become one of the only business areas within FNB that still operated on what was now an out-dated call management technology.

#### **4.7 The need for innovation**

One of the first investments made in the new business was to bring it back into alignment with the rest of the FNB call-centre teams in terms of the basic call management technology, and then to proceed to customise and add further technology advances to it to better deliver service excellence to both clients and bankers. Sixthly, the purpose was to create a business branded by high reputational capital, driven by a culture of “care, can and commit”. This became a burning platform for investing in the rebirth transformation journey and engaging me as researcher to deploy the rebirth transformation journey within Private Wealth Client-Servicing. This not only meant the business would need to start a whole new Service Suite operation (for the FNB Private Clients brand), but would also have to change the way in which it operated its existing RMB Private Bank Service Suite, as well as change the manner in which how internal and external customers perceived or experienced these brands.

An organisation’s culture may be one of its strongest assets, or may well be its biggest liability (Mbigi, 1994). In fact, it has been argued that organisations that have a rare and hard-to-imitate culture enjoy a competitive advantage. To deliver on its mandate towards the FNB 2025 vision, a new head was brought in to define and drive a new strategy for FNB Private Wealth Client-Servicing. The focus of this strategy was to create a new culture embedded within a sharp vision driven through the ethos of: “I Care, I Can, and I Commit.” This vision and ethos were co-created between leadership and the FNB Private Wealth Client-Servicing community. It was facilitated and led by me in preparation for deploying the rebirth transformation journey within this business unit to ensure a collaborative effort towards shaping what would inform realisation and delivery towards the 2025 vision. Malcolm Horn, the Head of FNB Private Wealth Client-Servicing mandated me to transform his business unit. It is this directive and the leadership intent for the future of the Service Suite that brought about the business need for rebirth to be started and carried forward within the business unit.

#### **4.8 Conclusion**

Chapter 4 presented the story of FNB, integrating within it the business problem faced by FNB Private Wealth Client-Servicing. In this chapter, we focused on the second C being Context, taking us into the story of FNB and FNB Private Wealth Client-Servicing, where the community embarked on the 4C integral journey towards connecting the critical issues within the business unit which ultimately precipitated a clear need for an inclusive transformational solution known as the rebirth transformation journey to be deployed. For technology, innovation, people and systems to operate effectively, add value and be aligned with FNB Private Wealth Client-Servicing’s 2025 vision, it is imperative to rebirth identity, and achieve the set mandate through engaging in the rebirth transformation journey to stay abreast of its competitors in today’s global business world. This will create the impetus to repurpose and reposition its brand value within the greater FNB Wealth, positioning it to own the client experience. With every innovation relations with customers deepen, making delivery more rewarding and effective, and strengthening return on equity that impact excellence in performance.

To compete successfully in a highly the competitive and constantly changing financial services environment, leadership needs to maintain an elevated level of technological fitness and the capacity to learn, navigating change to cope with new circumstances and challenges. The concept of technological fit attempts to improve client-service performance, and suggests that many leaders do not know how to lead systemic and fundamental change. In this chapter, the background and foundations of FirstRand, FNB, FNB Wealth and the birth of FNB Private Wealth Client-Servicing were presented. This dealt with the challenges the previous team called RMB Private Bank service team carried with them into the new Client-Servicing structure from which the burning issue for this thesis arose. This became my work-based challenge.

Within the case of FNB Private Wealth-Client Servicing the need to REBIRTH this business unit was birthed to cause a transformational shift which translated into the rebirth transformation journey on which this business unit embarked, and this therefore pointed clearly to the clear need for rebirth. It is evident from this chapter that FNB Private Wealth Client-Servicing is lacking in innovation, people and leadership commitment to move towards the FNB 2025 vision. Therefore, a need has been established to embark on a rebirth transformation journey to make the necessary shift. I was mandated to bring a solution to resolving the challenges within this business unit. I therefore proposed the rebirth transformation journey towards inclusive transformation.

It is clear from the above that for FNB Private Wealth Client-Servicing to equip and empower its human capital to move towards its 2025 mandate and innovation vision and to realise its business philosophy of: “I Care, I Can, I Commit”; a new leadership lens and inclusive transformational framework for engaging and realising its business mandate are now required. It is clear from the above that FNB Private Wealth Client-Servicing is facing a deep challenge to transform as it has not been able to formulate grounding in its identity, and thereby delimiting itself from its humanness and the gift of its diversity. It is also clear that this BU is lacking a rich cultural frame from which to locate its context and reason for existence that invariably impacts its ability to innovate. The head of FNB Private Wealth Client-Servicing asked me as OCD practitioner to tackle the situation, and provide a solution since he is concerned.<sup>3</sup>

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<sup>3</sup> This chapter is presented as a case, and will therefore not introduce the rest of the chapters as presented throughout this thesis.

## **Chapter 5: The Story of Communities of Practice (CoPs) and its relevance as new people form within the case organisation FNB Private Wealth Client Servicing – Co-creation**

*African tradition is based on spirituality, collectivism and a people orientation: Ubuntu. If we live in a sane society based on universal value of purpose, compassion and a common humanity the African paradigm is the way to go. Africa is not just the soil and the rivers but it is also its people.*

–Muendane (2006:209)

### **5.1 Introduction**

In Chapter 5, I will focus on the third C, being Co-creation, of my 4C integral journey (Lessem and Schieffer, 2009). In this chapter, I further develop the challenge facing the FNB Private Wealth Client-Servicing unit as previously mentioned, and position the concept of forming communities of practice within this business unit (BU) as a first step towards building an integral frame towards organically transforming this BU through a process called the rebirth transformation journey that will be applied later. In this chapter I position what communities of practice (CoPs) are, and why it became necessary to introduce such a people form within FNB Private Wealth Client-Servicing. I also set out to explain the importance of CoPs as an organisational form that drives sustainable value for an organisation that desires to leverage today's knowledge economy where the management of knowledge can give it the competitive edge it requires.

To enable the FNB Private Wealth Client-Servicing to address issues organically and in an inclusive manner that will catalyse a culture of innovation and thereby facilitate ecological transformation, I propose setting up CoPs that will be energised by identification to a common mandate and have the capacity and opportunity to integrate the learning which is prevalent in organisational forms of this nature. This will result in the unique value of bringing and drawing from diverse skills and knowledge, thereby becoming an integral part of a community that will co-create a future narrative towards holistically transforming this BU. Integral research as propounded by Lessem and Schieffer (2010) which this thesis is based on must always be geared towards theory and practice (Adodo, 2016). The story and theory behind the existence of the CoPs is presented below.

### **5.2 Background on introducing a new people form within FNB Private Wealth Client-Servicing**

The story of the CoPs within this BU reflects the dire state within the FNB case and the need to present it as part of a proposed solution towards addressing and bringing about an inclusive transformational frame identifying people issues, and addressing related challenges identified within FNB Private Wealth Client-Servicing. As previously indicated, one of the challenges facing FNB Private Wealth Client-Servicing was the perceived misaligned value system in the consultants' behaviour within this BU representing both the RMB and FNB brands.

The misalignment of values between consultants' representing both the RMB and FNB brands perpetuated the perceived dehumanisation already existent in the consultant's mind of this BU being a low-end environment not fit for their envisaged career paths to which consultants who came in with

tertiary qualifications were not willing to invest their careers and talents. This perception therefore created increased levels of disengaged staff as indicated in the results of the FNB employee engagement survey called the People Pillar Survey. Therefore, to move this BU forward a new culture needed to be developed and to drive this organically, I recommend setting up communities of practice as the starting point and energising people towards co-creating a cultural shift that would be attractive to new talent, inspire established consultants to seek change and facilitate alignment within the new and old consultants representing both the RMB and FNB brands to leverage their diversity as a platform from which to co-create innovation (Lessem & Schieffer, 2009).

### **5.3 People as one of FNB's Strategic Pillars towards 2025 and the need to establish an inclusive people form to unlock greater business value**

The FNB 2025 Vision states the following: "To be a great business helping to create a better world." Within this vision is the strategy which is captured as follows: "Building rewarding relationships with our customers, suppliers and colleagues." This strategy is anchored on the following three pillars: people, innovation, efficiency. In line with the first strategic pillar being, people, I propose setting up communities of practice (CoPs) within the case organisation, FNB Private Wealth Client-Servicing as foundational component for re-energising this BU and addressing challenges identified in an inclusive manner (Viljoen, 2008).

The CoPs were to later become part of the research community that would support in deploying the rebirth transformation journey. Various CoPs were formed in the rebirth transformation journey. To appropriately contextualise the research and discuss the conceptual frame of CoPs, I will focus on one CoP which is the greater CoP within the FNB Private Wealth Client-Servicing context made up of 15 people divided into three groups of five. Within the greater CoP, each CoP had a unique role in the context of reframing culture within FNB Private Wealth Client-Servicing, aligned to communal interest and strengths which was characteristic of these organisational forms. This unique value within the CoPs was later used within the rebirth transformation journey which will be presented in Chapter 7, and became not just a unifying component within the rebirth transformation journey, but also a strategic leverage for talent attraction and retention within the greater FNB business.

### **5.4 Communities of Practice as strategic driver for today's knowledge economy**

The thinking behind creating communities of practice was influenced by a need for co-creating a consciousness within FNB Private Wealth Client-Servicing where innovation could thrive. This would enable this BU to reframe its identity and collectively ground in values built on sound relationships, thereby aligning its core identity to that of the greater FNB. Likened with African societies, a community is not just a place where human beings live. A community consists of animals, plants, ancestors and the spirit (Adodo, 2016). For Somé (1999:91), individuality, not individualism is the cornerstone of community while Gafni (2001) believes the purpose of community is to care for and nurture the soil of every person's destiny (cited from Nussbaum et al., 2010:60).

The concept of CoPs is attributable to Lave and Wenger (2001), and can be described as a group of people who share a craft and/or profession. Wenger (1991) defines a CoP as a group of people who share a concern or a passion for something they do, and who learn how to do it better as they interact regularly. Lave and Wenger (1991:464) define a CoP as an aggregate of people who come together

around mutual engagement in an endeavour. Ways of doing things, ways of talking, beliefs, values and power relations; in short, practices emerge during this mutual endeavour. As a social construct, a CoP is defined by its membership and the practice in which that membership engages. A communal understanding of practice is what sets CoPs apart from traditional business practices as this understanding is developed amongst members on their own, resulting in shared learning and interests keeping the CoP together (Wenger, 2008). Hoadley (2012) simplified the concept of CoP by defining it as a community that shares practices, and thereby learning to solve problems through knowledge together, while Constant (1987) highlights ways in which knowledge is embedded in practices, and how communities of practitioners who share practices might be the correct units of analysis to examine knowledge.

In times of seeking authentic identity, each community always needs to go back to its core values to rediscover its identity. This means that nature and community are the home of humankind and the foundation from which science, innovation and transformation are birthed through reconnecting with nature (Adodo, 2016). To achieve this, a structure that is out of the norm of the usual structure of teams become necessary as teams generally exist, based on a commonality in their reason for being, and generally function within the frame of the commonality of that existence. Within organisations, teams tend to be project-focused, and invest their skills around that project while being managed by a specific manager accountable for the team. Per Wenger (2008:4) –

“...a CoP has an identity as a community, and thus shapes the identities of its members. A community of practice exists because it produces a shared practice as members engage in a collective process of learning. People belong to communities of practice at the same time as they belong to other organisational structures. In their business units, they shape the organisation. In their teams, they take care of projects. In their networks, they form relationships. And in their communities of practice, they develop the knowledge that lets them do these other tasks. This informal fabric of communities and shared practices makes the official organisation effective and, indeed, possible.”

Knowledge as a tool for transformation can be regarded as transformational knowledge. Transformational knowledge is thus an asset, skill and an advantage, not as an end but as a means (Adodo, 2016:56). Wenger (2008) reiterates the importance of CoPs in the functioning of any organisation. CoPs become crucial to those that recognise knowledge as a key asset. Knowledge created through CoPs is shared, organised, revised and passed on within and among them (Wenger, 2008). Daguid (2004) agrees that CoPs are concerned with identity and learning as the core of knowledge, identity and learning within. CoPs point to their ethical and epistemic entailments. Therefore, CoPs’ knowledge is "owned" in practice. Adodo (2016:56) rightly states the following on transformational knowledge:

“...it embraces to economic knowledge or expertise. It is knowledge of how to transform knowledge into goods and services. Transformational Knowledge creates, adapts and uses knowledge effectively for its economic and social development. It moves beyond segmented knowledge and sees knowledge as a unity. The most important thing for a nation is not its natural resources but its ability to create knowledge to transform its society and make the necessities of life available. Knowledge in this context is grossly neglected and unused in Africa, in Nigeria and in Esanland. Most often, it is wasted.

Transformational Knowledge is a process, a continuum: always evolving, becoming, flowing, and dynamic. It cannot be monopolized, blocked, tied-down or controlled. It upgrades and renews cultures open to it and eliminates those closed to it. It has its own inner dynamism, flow and logic. It has its own way of spreading and is unpredictable. Transformational knowledge, as this thesis will demonstrate, is the force behind historical and social changes. As knowledge evolves, society changes, institutions change, and people change, and are transformed. Inferior, fetish, superstitious and manipulative knowledge gives way to superior knowledge. Knowledge for development has a universal character even as it creates local identities.”

Communities of practice (CoPs) on the other hand, are a group of people who come together based on their interest to drive change in a specific area and use their collaborative energy and skills to realise their set objectives and outcomes in a manner that enhances growth through learning both within the CoP as well as without the greater ecology. CoPs feed off each other as a Nigerian saying states, “when something stands, another thing will stand beside it” Adodo (2016). This proverb is intrinsic to the African value of *Botho-Ubuntu* representing the gift of Africa which as a form is about integration rather than disintegration. It starts from a basis of communal wholeness and expands (Nussbaum et al., 2010). Khoza (2006) as cited in Nussbaum et al., (2010) agrees that *Ubuntu* is concerned with establishing harmony in diversity and creativity in community.

CoPs are driven by learning, which is an important platform from where innovation and change can thrive and flourish. The community of practice is driven by interest in the specific process, and therefore attracts people with interest in a specific change which means that the CoP cannot become stagnant as it continuously evolves and grows. Communities of practice are therefore practical organisational forms which have the capacity for reinventing organisations and growing reputational capital if cultivated and enabled to become fertile. Figure 5.1 below is an illustration of the different organisational forms, and details their divergent functions and unique contributions as adapted from Wenger and Snyder (2000: 142).

<b>A snapshot comparison</b>				
Communities of practice, formal work groups, teams and informal networks are useful in complementary ways. Below is a summary of their different characteristics.				
<b>Comparison</b>	<b>What's the purpose?</b>	<b>Who belongs?</b>	<b>What holds it together?</b>	<b>How long does it last?</b>
<b>Community of Practice</b>	To develop members' capabilities; to build and exchange knowledge	Members who select themselves	Passion, commitment, and identification with the group's expertise	As long as there is interest in maintaining the group
<b>Formal work groups</b>	To deliver a product or service	Everyone who reports to the group's manager	Job requirements and common goals	Until the next reorganisation
<b>Project team</b>	To accomplish a specified task	Employees assigned by senior management	The project's milestones and goals	Until the project has been completed
<b>Informal network</b>	To collect and pass on business information	Friends and business acquaintances	Mutual needs	As long as people have a reason to connect

**Figure 5.1** Snapshot comparison of the different organisational forms adapted from Wenger and Snyder (2000: 142)

Figure 5.1 above is a summary of the different organisational forms, being communities of practice, formal work groups, project teams and informal networks, and serves to offer a comparison of these different forms and the value each brings to an organisation. This snapshot comparison clearly articulates what the purpose of each organisational form is; the people who belong to that form, the reason for being and existence and what drives it as well as the length of time each form would function within (Adodo, 2016).

It is clear from the above Figure 5.1 that to effectively and efficiently create the nature of change required for addressing the burning issues within FNB Private Wealth Client Serving, communities of practice are an organisational form that would function most effectively towards realisation of its 2025 vision. They would be best suited for addressing the burning issues and needs within this BU to start understanding how best to align with the greater FNB culture of being an organisation grounded in the value derived from the knowledge economy. The FNB 2025 vision clearly illustrates that FNB is an organisation which seeks this competitive edge through its focus on innovation. However, the challenge within this BU remains the lack of such innovation owing to various legacy issues already shared; core being the people issues and an environment which does not nurture communal collaboration and thinking. This is also because of this BU not being driven by learning which integrates

the 70:20:10 learning and development model of 70% challenge assignments, 20% developmental relationships, and 10% course work and training as created by Lombardo and Eichinger (1996). Therefore, it is unable to ground authentically in these strategic pillars of technology, innovation, people and systems.

### **5.5 CoPs as a relevant organisational form for driving learning and innovation within FNB Private Wealth Client-Servicing**

CoPs are a relevant organisational form for advancing knowledge sharing, learning and change in today's knowledge economy. Wenger and Snyder (2000:139) describe communities of practice as "groups of people informally bound together by shared expertise and passion for a joint enterprise." Within FNB Private Wealth Client-Servicing, although this group was formally bound together by the nature of their jobs and roles, they were informally bound together by the need for reframing and re-engaging issues of identity and belonging in order to align it to their new business mandate towards 2025. They need to define what this means within the frame of the business in terms of strategy, technology, people and processes; as well as solidifying what creation of an unparalleled customer experience meant in relation to culture.

Wenger (2008) states that organisations recognise knowledge through CoPs, as a key source of competitive advantage. However, there is little understanding on how CoPs are created, and how these organisations can leverage in practice. He goes on to say that traditional knowledge management approaches attempt to capture existing knowledge within formal systems, such as databases. In order to systematically address the dynamic of "knowing" to affect a change in practice requires the participation of people who are fully engaged in the process of creating, refining, communicating and using knowledge. In this sense, communities of practice are fundamentally self-organising systems. The concept of CoPs speaks to the philosophy of *Botho-Ubuntu* which by its definition compels each CoP member to engage his or her life journey through communal interaction. The wisdom of Africa lies through and in the community as the true gift of diversity from which inclusivity emerges. Africa has a responsibility to help the world shape its destiny. It is time for the southern star to shine (Nussbaum et al., 2010).

### **5.6 CoPs as an organisational form to re-awaken innovation consciousness through engaging the Southern norm of *Botho-Ubuntu***

Based on the identified challenges that this unit faced within the context of FNB Private Wealth Client-Servicing, it became apparent that there was a need for an awakened consciousness that would embrace Southern norms of community and the value of humanness enshrined in the philosophy of *Botho-Ubuntu*. These challenges were the high staff turnover as indicated by the BU human resources records and the low engagement scores from the people pillar survey. The South reconnects to oneness through *Botho-Ubuntu* (Mbigi 2005) and communal voicing which pushes through conflicting agendas and subconscious schismatic realities through the power held in the spiritual quotient within the community and its willingness to openly and authentically engage with it.

Communities of practice framed within the Southern context, re-ignite the African philosophy of *Botho-Ubuntu* in how people may be brought together to drive social innovation (Adodo, 2016). FNB Private Wealth Client-Servicing has a core mandate of creating "an unparalleled client experience"

with a vision anchored in the philosophy I Care (Heart), I Can (Head), I Commit (Hands), within a greater business and FNB philosophy of: How can we help you? Understood holistically this is an *Botho-Ubuntu* philosophy of servant leadership and community seeking to engage the client at a subconscious spiritual level and letting go of the traditional Western premise that would probably state something like: “We know how.” These CoPs were to become part of the PAR team which would be facilitated in the rebirth transformation journey. A detailed explanation of PAR and its tenets will be presented in Chapter 6 of this thesis.

Therefore, the FNB business has built its business on communal *Botho-Ubuntu* philosophy and the value of relationship. The premise of starting from the heart space (I Care) instead of the head space (I Can) is testament to a business that subconsciously honours the Southern relational path of community and reason (Lessem & Schieffer, 2009), as well as the Southern value preposition of *Botho-Ubuntu* which put simply states: “I cannot be me without you”. I Care begins from the premise of acknowledging the presence of the other before my own, it subconsciously states that I see you and therefore value your existence before I even engage you. It is human and deeply relational.

A business philosophy which starts by stating: “I Care,” connects to the human soul, is deeply caring and authentically unthreatening. Sonyika (2003) believes that humans are created to be good and holy. This is the value of what the South brings, and this value needs to be cultivated and inculcated into the FNB Private Wealth Client-Servicing business to realise inclusive transformation that will propel it to create a culture embracing social innovation (Adodo, 2016). This was critical within this BU as community and relationship were bedrocks for servicing and for this BU to start functioning in a healthy and efficient manner. People issues and perceived historic relationship challenges need to be reframed. To achieve this, a unique and effective people form such as engaging a CoP frame has become necessary.

### **5.7 The perceived value of CoPs within FNB Private Wealth Client-Servicing**

The greatest value of a CoP within an organisation is that of being part of something larger than oneself which connects to your own individual value system to drive change, innovate and be part of co-creating a solution that would be sustainable into the future. Within FNB Private Wealth Client-Servicing, perceived value was in relation to the vision and philosophy set for itself in delivering on its mandate towards 2025. In this context, it became clear right from inception that people, and how they were organised and empowered to perform and inculcate new behaviour was the key. In his letters, Jung (1906-1950) states: “Your Vision will become clear only when you can consider your own heart. Who looks outside, dreams; he who looks inside, awakes.”

Jung’s (1953) words, as stated in the epigraph to this chapter, became a critical aspect in setting the roadmap for transforming this BU. There was a need to look into the heart, soul and consciousness of this BU and the people within it for the vision to become clear as in the heart, humanness and the correct emotion are engaged which translated into action catalysing innovation. The action required through mobilising the value preposition of communities of practice was that FNB Private Wealth Client-Servicing would influence a learning organisation, as CoPs by their nature are attracted to the value that can be derived from today’s knowledge economy, and ways in which to ground self in part of the learning process. This is characterised by untraditional methods happening mostly outside the

frame of organised classroom or workshop learning, and within the communal space of likeminded peers.

CoPs also ground in the identity behind the reason for coming together, being attracted more to engaging purpose for existence rather than coming together just to deliver on a project outside their interest. Through organisational forms of such a nature, strategy is integrated into being holistic and practical ways of delivering on this are explored, and in so doing innovation is encouraged as the communal drive. Focus limits the perceived fear and risk of innovation. CoPs by their nature comprise of those who are willing and open to pioneer and drive change, remaining nimble and agile towards navigating the complexity of change.

Communities of practice therefore are pro-active and solve problems quicker, leveraging communal brain power as well as transferring best practice that is relevant within their reality. Through this, they hone their individual and group cognitive ability, developing and sharpening their skills, and thereby becoming a hub for talent attraction and retention. As FNB has been branded “The most Innovative Bank”, it means that knowledge management is important as a strategic driver in this business. In driving strategy therefore, CoPs contribute effectively towards knowledge management in the organisation, and how knowledge is made easily accessible, and can be practically applied by all. After all, there is a direct link between knowledge and creation. To know is to create (Adodo, 2016). Strategy moves from being accessible only to executive and leadership teams, and becomes a locus point for re-energising the entire organisational talent. With strategy being easily accessible and understood at heart level, the risk of innovating is minimised and CoPs continuously seek ways of growing new lines of business which can drive innovation. CoPs are therefore co-owners of knowledge, new learning as they practice reflection, self-study, assessment, collaboration and action research (Marshall, 2011).

#### **5.8 How Communities of Practice were selected and organised within the FNB Private Wealth Client-Servicing context**

CoPs came together daily where possible within the FNB Private Wealth Client-Servicing context to engage on identified issues of concern around culture, to agree on interventions to be put in place and to design a high-level approach and plan towards creatively managing identified issues. As an OCD practitioner, I was made aware through existing knowledge that CoPs as an endemic phenomenon that occurred naturally to one could be explicitly created and fostered (Hoadley, 2012). This required synchronisation with the rest of the environment as in this context, the CoPs were still required to remain fully engaged within the work environment and with the environment being highly regulated in terms of client calls coming in available people to answer, CoPs had to build very strong relationships with the rest of their team on the ground, and to develop buy-in from the rest of the FNB Private Wealth Client-Servicing community to practically be given time off the floor.

The focus of the CoP in FNB Private Wealth Client-Servicing was to understand and drive strategy towards 2025, and to enable the greater Private Wealth Client Servicing to move from being a low-end call centre to becoming a world-class service suite which could facilitate various transactions for the wealthy customer. This empowers them not to be an elite group functioning in isolation and not focused on the technical aspects of business. Communities of practice have capacity to grow new lines of business as they work or consider the challenges direct within the organisation which leads them

to interrogate workable solutions, and thereby create innovation (Hoadley, 2012). Through knowledge sharing, they can promote best practice, develop greater skill and promote a culture of learning, making the environment an attractive option for attracting new talent.

## **5.9 Conclusion**

In this chapter, I have set out the theory behind the existence of communities of practice (CoPs) as an organisational form and ways in which this form enables an organisation to move towards its transformational mandate to cause social innovation.<sup>4</sup> I have shared briefly how a community of practice differentiates itself from a team, and showed the value of setting up communities of practice within a specific mandate. I have also discussed the importance of this form within the FNB Private Wealth Client-Servicing context and outlined how this was envisaged as a form appropriate to move this BU towards achieving its role towards the greater 2025 FNB vision. I illustrated why communities of practice would be a crucial platform for deploying the rebirth transformation journey as an inclusive process towards ecologically transforming this business. Chapter 6 will look at the research method and methodology used respectively and Chapter 7 will discuss the application of the rebirth transformation journey within FNB Private Wealth Client-Servicing. In Chapter 7, the practical contribution and role of communities of practice will be shared in more detail.

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<sup>4</sup> CoPs are also my PAR team, for the purposes of the chapters to follow; they will however be referred to as CoPs only.

## CHAPTER 6: Integral Research Approach (Methodology and research design)

*You engage methodologically and philosophically with existing theories, which have been built up over time to establish a solid analytical basis or paradigm for your research. You develop a philosophical and methodological foundation for your envisioned innovation, lodged in one or other of the social sciences.*

- Matupire (2014:111)

### 6.1 Introduction

Chapter 6 represents the second part of the third C being Co-creation. In this chapter I present the research method and methodology applied in this thesis. My research paradigm, research design, research context and research path will also be described in this chapter. Furthermore, phenomenology as my ontology and my epistemology being feminism will also be discussed in detail within this chapter. In this chapter I lay my research methodology which is PAR. Per Mouton and Marais (1996), research methodology is concerned with the way the research is prepared. Furthermore, Leedy (1993) states that research methodology forms an integral part of any research conducted. Methodology generally refers to underlying principles of inquiry instead of describing the specific techniques (Wolcott, 2002). Methodology therefore serves to support the nature of the data, as well as highlighting the methods employed, that will lead to the generation of appropriate conclusions through applicable data processing where after I will present my research method.

In this chapter I will also discuss the research method applied, being Integral Research Approach (IRA). IRA enables one to ground through an experience which engages auto-ethnography (Viljoen, 2016). I will further describe the data-gathering methods and sources employed in this thesis within this chapter. Kothari (1990:20) states: "Research methods refer to the behaviour and instruments used in selecting and constructing research technique. In simple terms, this means that research methods refer to the methods the researchers use in research operations."

As mentioned earlier in this thesis, this research is grounded in lived experiences and engages auto-ethnography. This is presented in Chapter 2 of this thesis which is my story as my grounding. I further described the data gathered on my culture as presented in Chapter 3 of this thesis. I then did a case study which is the story of FNB Private Wealth Client-Servicing in Chapter 4, and from this case study data is gathered through solicited data in the form of auto-ethnography, listening surveys, communal engagements which involve CoPs as part of focus group discussions, in-depth interviews, participative observations and CoPs collective voices, key informants, journals, notes and archetypes. In Chapter 5, I presented the story of the CoP within FNB Private Wealth Client-Servicing as a new people form which I formed and worked with for the purposes of this research towards transforming this BU.

### 6.2 Research paradigm

A paradigm may be viewed as a set of basic beliefs or metaphysics that deal with ultimate or first principle. A paradigm represents a worldview that defines for its holder the nature of the world, the individual's place in it and the range of possible relationships to that world and its parts (Guba & Lincoln, 1987:143). Blaikie (2007:3) describes a research paradigm as the broad philosophical and

theoretical traditions within which the researcher attempts to understand how the social world is conducted. Paradigm issues are crucial, no researcher ought to go about the business of research without being clear about just what a paradigm informs, and how it guides the approach as it is the frame of reference.

In this thesis, paradigm was taken to mean the perspective adopted to logically interpret data, which encapsulates such questions as; (i) what were the existing conditions in the FNB Private Wealth Client-Servicing set up; and (ii) what relationships, actions and interactions were being displayed in the data collected (Makangira, 2015:80). Paradigms are therefore basic belief systems based on ontological, epistemological and methodological assumptions which I briefly discuss further on in this paragraph (Guba & Lincoln, 1987). My ontology and epistemology will be briefly described hereunder.

### **6.3 Ontology**

Ontology can be described as a branch of metaphysics dealing with the nature of being or the study of being or the study of “what is” (Chalmers, 2002) and Blaikie (2010). It is also concerned with investigating what organisations exist and how these organisations relate to one another based on their similarities and their differences (Mamukwa, 2013). Ontology therefore deals with the nature of reality. In this research, my ontology is phenomenology.

I adapt phenomenology meaning that my ontology is phenomenological. This means that belief is grounded in the view that we exist and co-exist in a complex system. This system does not comprise one single life world, but multiple sets of overlapping worlds, starting in the home world, and expanding further into the greater universal ecosystem to connect with other cultures. In this light, multiple and varying methods of collecting data are engaged in this thesis to enable the satisfaction of the ontological perspective adopted as data that comes from multiple sources with different viewpoints to thereby improve data quality.

In line with the Southern relational path, phenomenology according to Lessem and Schieffer (2009) involves immersing self in an evolving life from being, feeling and experiencing as well as describing a world in which humans as a community continuously cycle through and indeed recycled in narrating their stories. Lessem and Schieffer (2009: 126), state that phenomenology operates in the following form: Whilst it is theoretically oriented, it does not generate deductions from propositions that can be empirically tested. It operates on a meta-sociological level, demonstrating its premises through descriptive analyses of the procedures of self, situation and social constitution. Through its demonstrations, audiences are guided to understand how phenomena, originating in human consciousness, come to be experienced as features of the world (Makangira, 2015).

### **6.4 Epistemology**

Epistemology can be defined as a branch of philosophy that deals with the sources of knowledge, especially the critical study of its validity, methods, and scope (Hallebone & Priest, 2009). Blaikie (2007) defines epistemology as a philosophy of how human beings come to have knowledge; how we know (Chalmers, 2002). I adapt feminism as epistemology. My epistemology is feminism which concentrates on the liberation of women complementing the androcentric perspective removing any distortions brought by looking at one perspective only (Matupire, 2015).

It is through feminism that central conceptions of the relational emancipatory feminist research methodology, situated knower and hence knowledge that reflects the perspectives of the subject empowering women and the marginalised in society through increasing their voices in the relational South are born. To that extent, knowledge should consciously attempt to represent human and more-than-human diversity, aim at creating social change, and be a tool for liberation. Knowledge does indeed emancipate, involves altogether as such, co-creates between not only scientific process (research methodology) and content (relational enterprise and economy), but also individual research and institutional innovation (Lessem et al., 2014) and Palmer and Stough (2001).

Feminism therefore builds on the wisdom inherent in nature to uncover core organic knowledge and global views (Makangira, 2015). Its core vision is to create social change through knowledge as it perceives knowledge as a tool for liberation that strives to represent, and express, human and natural diversity in the Southern and global knowledge economy (Makangira, 2015). Feminist epistemology investigates methods in which strong ideas and practices of knowledge systematically disadvantage women and other marginalised groups, and seeks to transform these ideas and practices to align with the interests of these groups. The androcentric perspective acknowledges that women, representing cooperation and community, need to be included primarily in the study and thus in the interpretation of results. Hegarty and Buechel (2006) define androcentricism as the implicit conflation of maleness with humanity and the consequent attribution of gender differences to females, often to women's disadvantage. Gender inequality is a significant problem, however, when androcentric research is described as representative of the universe under study and findings are presented as universally true.

Some feminist researchers propose that social science dominated by theories and concepts emerging solely from a male consciousness may be irrelevant for the female experience and inadequate for explaining female behaviour (Lessem et al., 2014). At the most basic level, then, feminist research simply attempts to incorporate into social reality the female perspective. Further, feminist criticism of established research often stems from a distrust of the power and perspective of androcentric in research and society, and not from a rejection of traditional methods of inquiry. As such, some argue that feminism is rather a perspective than a method in itself (Alexander et al., 1993) and (Dick, 1990). The subject and object of feminism, together with the methodology are interdependent; feminism moreover, as such, is a science in which no rigid boundary separates the subject of knowledge (the knower) and the natural object of that knowledge.

In contrast with much of mainstream research, which generally seeks to attain value neutrality, feminism often proposes a "metabolism of subject and field," seeing researcher and researched as one organism. Feminist researchers will often integrate individual experiences into their research. Feminist philosophy is one of the major contemporary sociological theories, which analyses the status of women and men in society with the purpose of using that acquired knowledge to better women's lives (Ritzer & Goodman, 2004). Feminist theory focuses on giving a voice to women and sharing the many ways women contribute to society. In line with Anderson and Taylor (2009), feminist theory looks at societal differences between men and women, focusing on such critical issues as gender differences, gender inequality, gender oppression and structural oppression.

In the context of this thesis, the focus on feminism is about engaging the right brain and creative thinking towards social innovation and inclusive transformation (Viljoen, 2008). It is used as a platform

to bring about transformation in the OCD field of study. Feminism explores the power of the maternal which predominantly exists tapping into the right brain creative thinking to create balance and well-being in human ecology retells our stories and creates a new narrative towards our future value proposition devoid of the ills of apartheid constituted mostly as white, male patriarchal structures designed not only to marginalise by race, gender or creed, but also by geography and age group. Feminism is about letting go of notions which marginalise the Southern norms and value proposition as unrefined and not worthy, and raising the voice of the South, its people, communities, symbols, archetypes and processes of organisational change and development grounded in the Southern roots of community and *Botho-Ubuntu* (Lessem & Schieffer, 2014).

Through engaging feminism in this thesis, I gave rise to FNB Private Wealth Client-Servicing's rebirth journey. FNB Private Wealth Client-Servicing's freedom emanates from an awareness of the issues giving rise to the disconnections between Client-Servicing and its internal and external clients. The clients had a platform through the rebirth transformation journey to express their views on issues that impact service delivery which leads to a seamless client experience. According to Lessem and Schieffer (2010), a feminist critique of the knowledge gained will emancipate people from the bonds of Western prescriptions to transformation and development. A critical ingredient of feminist emancipatory orientation is that it aims at creating social change, whereby it sees knowledge as a tool for liberation, which strives to represent and express human and natural diversity. According to Lessem and Schieffer (2010), feminist epistemology identifies ways in which dominant conceptions and practices of knowledge systematically disadvantage women and other marginalised groups, and seeks to transform these ideologies and practices so that they serve the interests of these groups and most importantly giving voice to the marginalised. I therefore adapt a phenomenological ontology and a feminist epistemology. This means that I immerse myself in the lives of the people in FNB in South Africa and will bring voice to the once dehumanised, devalued and discarded FNB Private Wealth Client-Servicing, through deploying the rebirth transformation journey in this business unit.

## **6.5 Methodological assumptions**

Methodological assumptions deal with the process of research (research strategies) within the research paradigm. The methodological assumption in this thesis is concerned with how data is to be collected, presented and analysed. Within the qualitative paradigm one uses the induction strategy to gain a deeper understanding of the meanings attached to the events (Viljoen, 2008). Other researchers such as Adler and Adler (1987) stated that qualitative research involved a subjective methodology and that the self was used as the research instrument. Viljoen (2008:258) defines qualitative research as, "involving a multi-method approach to make sense of things in their natural setting in terms of the meaning that people ascribe to them." Furthermore, Viljoen (2008) states that:

"...qualitative research seeks to understand the meaning and beliefs underlying actions and not the observable behaviour only. Qualitative research acknowledges the contextual nature of inquiry. Qualitative research is concerned with the meaning of a phenomenon rather than the frequency thereof and that the phenomenon should be studied within its social context. Qualitative research entails acknowledging the difficulty of portraying and understanding the complexity of social reality on the basis of one set of data only as well as "watching people in their own territory, interacting with them in their own language, on their own terms."

Cassell et al., (2006) observe that qualitative techniques may provide powerful tools for research, and are found increasingly in all domains within the diverse organisational context. Platt (1996) stated that in qualitative research there was a greater desire to identify the unique characteristics that constituted specific cases. Howe and Eisenhart (1990) argue that standards in respect of research should not be judged in terms of qualitative versus quantitative paradigms, but rather in terms of the successful investigation of problems. This thesis followed the inductive approach in terms of which data is collected and theory developed because of the content analysis (Viljoen, 2008). This approach is applicable as its primary purpose is to allow for research findings to emerge from themes within the raw data, without restraints being imposed by structured methodologies, Jackson (2000) and Viljoen (2008).

Patton (1990) argues that purity of method is less important than commitment to the quality of the information. Olson (2006) states that the theory or the discipline and the methodology applied are inevitably interlinked. Qualitative research involves an in-depth understanding of human behaviour and the reasons why these behaviours manifest (Morgan, 1979). Unlike quantitative research, qualitative research relies on the reasons underlying various aspects of behaviour. Thus, it focuses on the why and how of a topic and not on the what, where and when that is provided by quantitative research data (Taylor & Bodgan, 1998). Smaller sample groups rather than large and random samples are usually investigated (Patton, 2002).

## **6.6 Integral Research Approach**

Integral Research Approach (IRA) as the research method applied in this thesis enables one to ground to core through lived experiences and engaging auto-ethnography (Viljoen, 2016). IRA is a qualitative research approach of phenomenology towards social and economic innovation which is trans-cultural and trans-disciplinary building on the knowledge from all four worlds being, South, East, North and West (Lessem & Schieffer, 2009). IRA is rooted deeply in individual specific cultural context aimed at addressing individual or societal burning issues at the level of self, organisation and society thereby enabling global integration (Makangira, 2015). The research path presented in Paragraph 6.9 of this chapter will delve deeper into IRA.

## **6.7 Qualitative research**

The distinguishing characteristics of qualitative and quantitative research are both methodological and philosophical (Patton, 1990) and (Viljoen, 2008). Qualitative research may simply be defined as methods of data collection and analysis that are non-quantitative (Lofland & Lofland, 1984). Berg (1998) defines qualitative research as a research method which focuses on quality – a term that refers to the essence or ambience of something (Viljoen, 2008). Creswell (1994), Leedy (1997) and Viljoen (2008) agree that qualitative research constitutes one of the two major approaches to research methodology in social sciences.

The research paradigm in this thesis is qualitative as this allows and enables rebirth as an organisational transformation journey to be studied and engaged in its organic and complex natural environment. According to Creswell (1994) there are three fundamentally different assumptions which distinguish quantitative from qualitative research which I applied within this thesis. Within this

thesis an inductive approach was used which means that new theory will emerge from the data that will be collected.

Firstly, quantitative researchers typically assume a single objective world, while qualitative researchers typically assume that multiple, subjectively derived realities may co-exist. Secondly, quantitative researchers assume their independence from the variables under study whereas qualitative researchers commonly assume that they must interact with the phenomena which they are studying. Thirdly, within the methodological assumption; quantitative researchers apply deduction; limited cause-effect relationships and context free methods whereas qualitative researchers tend to apply induction, multivariate and multi-process interactions and context specific methods. The way data was collected, analysed and presented was a key concern in this thesis as this was my methodological assumption. In qualitative research paradigm, the inductive approach is applied enabling deep understanding and meanings attached to the events (Makangira, 2015). An inductive approach was followed. This means that this research is qualitative.

## **6.8 PAR as a method**

Reason and Bradbury (2001:1) define participatory action research as, “a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes.” This means that PAR is an integral approach that seeks knowledge for social or communal action towards transformation as it also develops and empowers people. In this thesis, PAR as a methodology is used. PAR within FNB Private Wealth Client-Servicing facilitated an analysis of social reality and involved the full and active participation of the community. The knowledge workers embarked on a rebirth transformation journey and represented the corporate community within FNB Private Wealth Client-Servicing. PAR is aimed at the exploited, the poor, the oppressed and the marginal, and creates awareness of the people’s own resources, whilst mobilising for self-reliant development. I thus followed an inductive qualitative approach.

The goal of the research is the radical transformation of social reality through living theory in which I am a committed participant, facilitator and learner to better understand the strategic value of the applied methodology towards organisational change and transformation. I positioned myself within the case organisation as the rebirth matriarch and facilitated three workshops assisted by a community of elders (CoE) to ensure every voice was heard. These workshops often began with an outpouring of African song of African choir, Imilonji KaNtu which would set the scene with the song “Gabi” – “Umfazi ongazalanga” (a womb which never gave birth) bemoaning the lack of the spiritual quotient within self. Seeking one’s true self beyond feminism to cause a shift from right-brain thinking to awakening the left brain to emerge in African oneness presented by the colour purple enabling organic transformation in the South (Laubscher, 2013) and (Viljoen, 2008).

Within this research, I employed PAR as my research methodology using listening surveys, focus group discussions (FGDs), in-depth interviews (IDIs), participative observations and key informants as the main methods of investigating on the impact of rebirth as a solution for social innovation and inclusive transformation with the rebirth CoP and the greater FNB. Musson (2006) and Creswell (1998) acknowledged that knowledge itself is interdisciplinary, and therefore the ultimate truths to be discovered will have to come from multiple perspectives.

Having established the philosophical and methodological bases for writing this thesis, it is the key to navigate it towards the emancipation of transforming organisations within the Southern norms of REBIRTH. Navigation, as the third level of the Southern path of this integral thesis, serves at creating a free mind-set and an improved theoretical and practical beginning point from which to effect a REBIRTH and thereby social innovation. Navigation is therefore through feminism. Offen (2012) is of the view that feminism consists of a wide spectrum of ideas whose developmental stages have been dependent on, and in tension with, male-centred political and intellectual dialogue. It is also a concept that can encompass both an ideology and a movement for socio-political change based on a critical analysis of male privilege and women's subordination within any given society (Scott, 1986). Feminism has also been viewed as a pro-woman view that works against their subordination by men within social systems through challenging patriarchal systems, organisations and mechanisms to remove masculinist hierarchies (Kendall, 1998).

## **6.9 Research Path**

### **6.9.1 The Integral Research Approach and path**

IRA, according to Lessem and Schieffer (2009:17), is designed to bring about social innovation through addressing a burning issue, bringing relief to society. In doing so this thesis will follow a fourfold path which is, “from ground up, analytically (method to action) and transformatively (originate to transform), thus encompassing method (origination) and methodology (foundation) emancipation (critique) and ultimately transformation (action research).”

This methodological approach thus meant that my role as the researcher, as well as that of the community within which the research was conducted being; FNB Private Wealth Client-Servicing was to ground and connect to core through collective and individual stories framed within the collective culture. This necessitated grounding FNB Private Wealth Client-Servicing to Southern core and the culture of the South rooted primarily in community and the essence of the human spirit (*Botho-Ubuntu*), as opposed to its traditional Western and pragmatic way (Lessem & Schieffer, 2009).

### **6.9.2 GENE**

IRA follows four integral renewal paths which carry one through their integral research journey in which the GENE represents grounding, emerging, navigation and effecting (Lessem & Schieffer, 2010). I chose to follow only one of these paths being the Southern relational path represented within the GENE 4C as grounding. This research adapts Lessem and Schieffer's (2009) Four World orientation in a humanistic way towards rebirth. The rebirth transformation journey is my unique educational approach towards social innovation and social economic transformation through realising the collective and individual GENE-ius, most specifically from the South (Lessem & Schieffer, 2009).

The research GENE path will move from description (grounding) to phenomenology (emerging), feminism (navigation) and ultimately participatory action research (effecting). Detail of each of the GENE path will be highlighted as it happened in the womb of the rebirth transformation journey deployed within FNB Private Wealth Client-Servicing. Through the rebirth transformation journey, case organisation's culture connects to a wider culture of the people of the South in their cultural soil

and combines local indigenous and exogenous knowledge to catalyse the evolution and sustainable transformation of the South, thus releasing its GENE-ius (Lessem & Schieffer, 2009:33).

Table 6.1 below is the diagrammatic presentation of the IRA path in accordance with this thesis's research path; the Southern relational path aligned with humanism. This diagram incorporates the analytical, transformative and their tenets, the applicable techniques, methods, human modalities and the GENE used through rebirth within FNB Private Wealth Client-Servicing. Table 6.1 below is adapted from Lessem & Schieffer (2009) GENE and Makangira (2015) depicting the GENE.

**Table 6.1:** Analytical IRA Path adapted from the GENE (Lessem & Schieffer, 2009 and Makangira, 2015)

Analytical Tenets	Research Methods	Overview of path and techniques	Gene	Human Modality	Transformative
<b>Method</b>	<i>Descriptive (Qualitative)</i>	<ul style="list-style-type: none"> <li>Tribal circle in its natural nature setting, Southern norms and symbols, grounding to Core</li> </ul>	Grounding	Being	Origination
<b>Ontology</b>	<i>Phenomenology</i>	<ul style="list-style-type: none"> <li>You become immersed in the Communities' life and world- Culture, organic, ecological and deeply transformational, Inclusivity,</li> <li>You provide a base from which to voice – voicing and the capacity as well as ability to hear succinct levels of multiple voicing</li> <li>Radical enquiry within your inner world, reengage the experience of the womb to rebirth a new identity as well as new narrative towards an innovative Southern proposition; Emergence/ Calling</li> </ul>	Emerging	Becoming	Foundation
<b>Epistemology</b>	<i>Feminism</i>	<ul style="list-style-type: none"> <li>Knowledge gained is for community and the greater ecosystem and realising your calling within this context, connect deeply with the maternal African, Navigating/ Connecting</li> </ul>	Navigating	Knowing	Emancipation
<b>Methodology</b>	<i>Participatory Action Research</i>	<ul style="list-style-type: none"> <li>Effecting/Causing, Effective engagement with community in question</li> <li>Serve/engage in the South towards aligning the four worlds (South, East, North and West) and cause a global transformation through engaging archetypes, reflection and journaling</li> </ul>	Effecting	Doing	Transformation

Table 6.1 above demonstrates the way in which IRA follows a double layered path in which the analytical (research) tennets are interconnected with the corresponding transformative (innovation) path (Lessem & Schieffer, 2009). The analytical path is explained by means of the GENE acronym: grounding, emergence, navigating and effecting whilst the corresponding innovation path is explained by means of the GENE mirror image, the OFET, which the acronym represents: origination, foundation, emancipation and transformation. In this “genetic” relationship the analytical informs the transformative whilst the transformative provides substance and validity to the analytical (Lessem & Schieffer, 2009) and Makangira (2015). The proposed integral research as the methodology in this thesis aims at achieving a balance between the increasing globalisation tendencies which side-line the social, political and cultural roots dividing the world, sparking conflict and ultimately impacting the economy. This methodology therefore seeks to create a path of innovating and willingness to transform to cause an ecological and organic change in the greater knowledge economy. The GENE path within the context of this thesis is described hereunder.

### **Step 1: Grounding: Origination (Descriptive)**

The first step of IRA is origination which comprises of my grounding as a social science researcher and practitioner within the domain of Organisational Change and Development within the Southern relational path (Lessem & Schieffer, 2010). The process of conducting research entails describing or contextualising phenomena in intricate detail. As an approach, I position myself in a community and place, being the South, as told in my story in Chapter 2 of this thesis. This process comes naturally from my life journey where the relational aspects of being are embedded and intrinsically intertwined in my being from conception. My spiritual and emancipator aspects impacting human quotients which are expressed through feelings and thinking patterns are possibly because of a journey through colonial suffragette disguised as Afrikaner supremacy conceived in the illegitimate womb of Apartheid, multi-cultural experiences, exposure to Western dictates and world travels.

It is clear from the above that aspects of this research and innovation work will demonstrate a continuum between the four worlds, although the overall orientation is deeply rooted in the Southern relational path. The first level of origination comprises individual grounding and collective pursuits as Organisational Change and Development practitioner. My transformative path begins with a vivid description of “my story”, and contextualises my life experiences, country, community and Africa in perspective to total immersion in the life I live and survived through the lens of Apartheid. I navigate through the lens of Apartheid within my communities and the mental imprisonment of life. The research path describes the context in which I, my community and society, South Africa, are intricately connected to each other: “We are a people and community from the South.”

It is through this thesis that I understand how the community, society, organisations and the world could transform organically, ecologically and in an inclusive manner through grounding to Call in authentic identity and community (Viljoen, 2008). The origination within the case organisation in grounding to its Call is immersed as the human modality of being. The techniques comprise natural settings in nature, embracing Southern norms through engaging symbols and Southern African practices in the rebirth transformation journey and the tribal circle being the womb of rebirth in aid of discovering and uncovering my Call and authentic identity. My grounding was the foundation of my personal Rebirth, rebirth as a transformation journey within the FNB case organisation and REBIRTH which is my contribution to the field of study which can be applied in other organisations.

Origination precedes foundation as it is the point of access for phenomenology (Lessem & Schieffer, 2010). Lessem (2010) points out that research origination through the Four Worlds leads to transformative innovation, and is linked to the research method. Lessem and Schieffer (2010:18) further state that “Method serves to ground your research, analytically and reflectively; it is also an active source of origination of a particular social innovation, aiming to resolve a burning issue in your cultural and social context.” This means that origination of social innovation requires embarking on a creative path for foundation to emerge.

### **Step 2: Emergence: Foundation (Phenomenology)**

The second step of IRA is emergence, wherein I emerge individually and collectively, from the local to the global sphere in my overall orientation in the “developed world”. This step serves to establish the four realities (humanistic South, holistic East, rational North, and pragmatic West) which I aim to resolve (Lessem & Schieffer, 2009). Lessem and Schieffer (2009), state that one develops a philosophical basis for their envisioned innovation individually or collectively, grounded in one or another of the social sciences. One learns to envision a philosophical foundation with which to engage in this phase. In its very essence, this is a fundamental critique of society or response to a fundamental flaw in the prevailing tradition. By embracing the story of one’s culture, one begins to understand that every social innovation needs a solid theoretical and philosophical foundation. This was presented in the story of my culture in Chapter 3 from which I emerged.

Innovation foundation is presented as the research methodology as adapted from Lessem and Schieffer (2010). Lessem and Schieffer’s (2010), foundation encompasses: “Theory-based methodology which serves as classical research foundation, philosophy or paradigm on the one hand, to develop an analytical knowledge base to substantiate the chosen method; on the other hand, it serves transformatively to provide a base from which to address a burning issue.” It is needless to say that a good foundation holds a competitive advantage in achieving social innovation for any organisation (Matupire, 2014). Foundation, therefore, succeeds origination becoming social foundation towards the path of social emancipation.

### **Step 3: Navigation: Emancipatory (Feminism)**

The third step of IRA is navigation. Having established the philosophical and methodological bases for carrying out the research and innovation, and within this step new insights are translated into new concepts, new knowledge, modern technology, new organisations that now assume global quota. I take the Southern path within relational emancipation, and turn from origination, through experiential grounding to evoke my call and burning desire and activate the FNB Private Wealth Client-Servicing community. The burning issue is the research foundation through which imaginative emergence is involved. Navigation by building upon the context and catalysing development engagement forms relational co-creation and institutionalisation of research and innovation.

Emancipation creates awareness for people to see the root-cause of a social problem and encourages them to propose a sustainable and holistic solution that may well surpass the original requirements. Emancipation towards social innovation occurs through feminism (Lessem & Schieffer, 2010). Lessem and Schieffer (2010) declare: “It is where the researcher becomes a philosopher, engaging oneself in a fundamental critique of the contemporary paradigm, with a view to moving towards an emancipated state. This is done in analytical relation to the underlying theory base as well in transformative relation

to promoting social betterment, with a view to bringing about social innovation.” It is therefore the research critique linked with sources of emancipation behind the innovation. I embodied social science as method and process, more specifically as content and substance to emancipatory, feminist research orientation, leading to social innovation.

Navigating is about shifting minds to another level in the human system, through critical emancipatory thinking whilst still in touch with the pre-existing emotional and spiritual human quotients (Lessem & Schieffer, 2009). The navigation step is a point of conceiving a new global phenomenon as a new concept on the social sciences, if not also the humanities, and enables me to link it with existing local knowledge content to prepare for a newly-conceived conceptual synthesis, emancipating me from the issue at hand.

Through Step 3 I serve to provide an overtly radical, transformational innovative methodology. I immerse myself deeper and developmentally, in the specific societal and cultural context in which the burning issue is lodged. I further emancipate myself as matriarch of the rebirth transformation journey, building a new theoretical foundation for collectively envisioned transformation and social innovation. This is where I begin to move from a social and economic philosophy to a social movement being, feminism. It is in this way that emancipation makes provision for necessary grounding for the innovation.

#### **Step 4: Effect: Transformation (Participatory Action Research-PAR)**

Step 4 focuses on action research as a conduit to bring about social innovation in which I deploy participatory action research (PAR) grounded in living theory to integrate several types of investigation that will inform this integral framework. PAR builds on all previous steps to realise and cause the necessary transformation bringing about holistic integral innovation. Generic action research, as originally developed by Lewin (1998), and later by Reason (2001) is a form of reflective action undertaken by participants in social and economic situations to improve the rationality and justice of their own practices, as well as their understanding of those practices and the situations in which these are carried out.

Social transformation is linked to PAR as the research methodology (Lessem & Schieffer, 2010). Lessem and Schieffer (2010) posit action research as “Integral Research design, which does not stand in analytical isolation. At this ultimate level the researcher or research community effectively engages with society to transform the originally identified burning issue into a full-fledged social innovation and, at the same time, develops a new kind of organization.” PAR therefore encourages effective communal engagements and causing in the South towards aligning the four world poles (South, East, North and West) to cause global transformation. This human modality of doing or transforming may be done through engaging in archetypes, reflection and journaling. Within the FNB case PAR was used to realise the value of inclusive transformation through CoPs and this is presented in greater detail in Chapter 7 where the rebirth transformation journey is practically applied.

#### **6.10 Research design**

Kothari (2006) states that research design helps the researcher in planning the methods to be adopted for collecting the relevant data and techniques to be used during analysis. The nature and objectives of the challenge to be studied and the means of obtaining information towards resolution are the

critical factors to be engaged to choose the appropriate research design. This thesis adopts a pure qualitative approach being IRA fused with auto-ethnography in part in my story, and my culture incorporated my core and Calling phases as adapted from Lessem and Schieffer (2009). Discovering and uncovering new knowledge are at the heart of this thesis. However, such discovery is through actual living and reliving certain experiences and practically, as well as consciously collaborating to co-create the desired outcome, thereby following a phenomenological approach.

#### **6.10.1 Four worlds and four human modes – an integral design**

This thesis is adapted on real social to innovation design building on the four human modes (Lessem & Schieffer, 2009) of being, becoming, knowing and doing, as well as on the four worlds of South, East, North and West. According to Lessem and Schieffer (2009), this involves releasing your GENE-ius individually, organisationally and societally from the bottom up. In rebirth the four human modes as defined by Lessem and Schieffer (2009) would be described and connected to the 4Cs of human evolution and transformation being: Call, Context, Co-creation and Contribution as adapted and applied throughout this thesis (Lessem and Schieffer, 2009). Lessem and Schieffer's (2009) drawing off Jung's (1953) psychological feeling (humanistic), intuiting (holistic), thinking (rational) and sensing (pragmatic) provides an accessible mapping of the world's numerous social and cultural types into four distinct groupings or four worlds. The Four Worlds perspective divides the world into four cultural types represented respectively by the humanistic South, the holistic East, the rational North and the pragmatic West (Lessem & Schieffer, 2010).

Whilst premised on the physical worlds poles, the Four Worlds perspective does not necessarily refer to the physical world but to an intellectual, philosophical and spiritual construct for illuminating insights into societal problems in a much more holistic and balanced manner that considers the local and global dynamics, engaging both the inner and outer ecosystems in whole explained by Lessem and Schieffer (2009). Integral dynamics, within the context of a Four Worlds perspective, makes it possible to select a methodology that is best suited to the research orientation and research problem. The physical world and the Four Worlds perspectives are closely related to a researcher's background and to the societal context which gives rise to it. A given research methodology or path is preferentially selected depending on the nature of the problem that the research seeks to address, and depending on the cultural orientation based on the four worlds mapping (Adodo, 2016). The focus of this thesis, considers the four worlds – South, East, North and West to capture the overall multiple realities of the rebirth transformation journey, and the generic orientation towards renewal is specifically focused on the South (Laubscher, 2013) and Lessem and Schieffer (2010). Per Lessem and Schieffer (2010) there are four paths to integral research and innovation which will now be discussed.

The Southern path originates authentically in grounding, and takes a relational path aligned with humanism and community (Lessem & Schieffer, 2010). It is within the South that a community theoretically and practically draws on ecology, anthropology and geography to enable and engage in a rebirth transformation journey (Lessem & Schieffer, 2009). As the community embarks on this rebirth transformation journey into the East, the path of renewal; there is a conscious evolution and societal renaissance which practically focuses on internal development of a culture and society. Theoretically, the Eastern path of renewal draws on humanities, philosophy and spiritual rebirthing (Lessem & Schieffer, 2010). From the East, rebirth journeys onto the North wherein critical issues are identified and new knowledge is acquired; this is also the path of reason (Lessem & Schieffer, 2009).

The East practically allows for building public, private and civic partnerships whilst theoretically drawing on complexity theory, communications and political science.

The rebirth transformation journey continues to the West, where the community value proposition is tangibly defined to go back into the South where new discoveries and successes are shared with the community (Lessem & Schieffer, 2009). The path of realisation in the West creates growth and opportunity, and ensures sustainable development to alleviate poverty through promoting enterprise and theoretically draws on economics, management and business studies (Lessem & Schieffer, 2010). As mentioned at the beginning of this chapter; I will engage the Southern relational path of community (humanism) primarily because of my grounding to Call in the South towards uncovering new value proposition and unique innovations which are to be birthed through rebirth in the South (Hopkins, 2010).

### **6.11 Sampling**

IRA places emphasis on the need to do research which is premised on one's burning issue. This is the issue of identity and organisational transformation as stated in the research questions stated in Chapter 1 of this thesis. This research journey took place in FNB Private Wealth Client-Servicing as it was the work environment within which my work-based challenge (WBC) was. Of key importance is the fact that using IRA, I had to live the life of the business unit, as well as that of the community under study. The sample is a good representation of both FNB (PW) and RMB (PB) as it has the correct mix of both making up the whole of FNB Private Wealth Client-Servicing. All other participants were appropriately consulted, and they agreed to participate based on willingness, availability and ability to articulate issues and have good stories to narrate (Plummer, 2001).

A purposeful, selective sampling process was used to identify the focus group interviewees (Patton, 1990). Patton (ibid: 169) argued that the logic of purposeful sampling is dependent on selecting information-rich cases for the study. The implication of Patton's (1990:169) argument was that critical thinking about the people that were going to work with me as research participants. It was very important to carefully identify research participants with the greatest potential to provide the in-depth and relevant data regarding the focus of this thesis. Appendix B in this thesis illustrates the phases of rebirth, data gathered, activities, focus group themes, sample size and hierarchal levels of those individuals who were selected for these focus group sessions which were conducted in the Xhosa room, the rebirth innovation hub. All the participants actively participated and contributed quite substantial information and insights on how the rebirth transformation journey rooted in Southern African norms, philosophies, rituals, symbols, consciousness and indigenous knowledge could be integrated with the Eastern, Northern and Western transformational philosophies to foster balance, inclusive systemic organisational change and development. Data generated during the in-depth interviews was captured by way of brief notes and reports which will be presented as the researcher's participative observations and the collective CoP voices which are captured in Chapter 8.

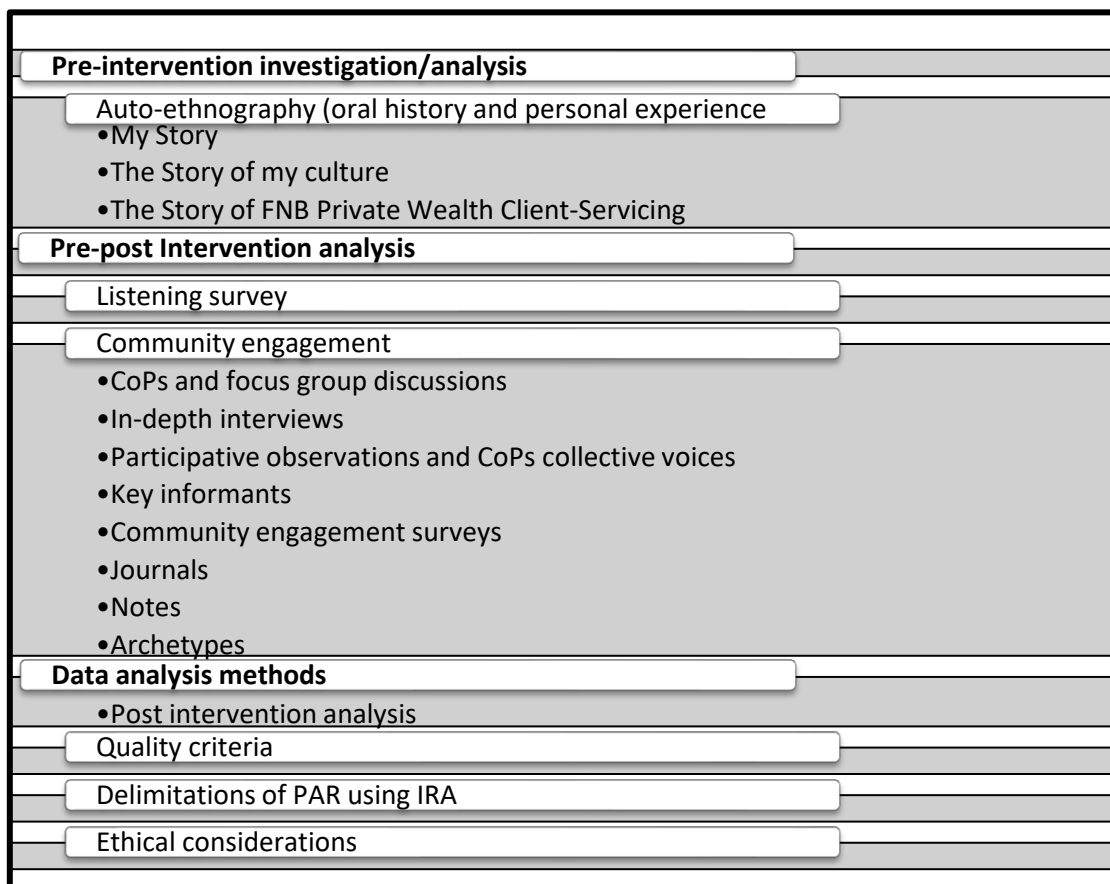
### **6.12 Data-gathering**

To facilitate the research, the following data-gathering methods were used: Auto-ethnography (oral history and personal experience) as my pre-intervention investigation wherein I told my story, the story of my culture and the story of FNB Private Wealth Client-Servicing as presented in Chapters 2, 3

and 4 respectively. In my story, my grounding to Call in authentic identity was conceptualised as Rebirth after which, the story of my culture towards communal Call emerged to cause transformation within organisational ecology as presented in the story of FNB Private Wealth Client-Servicing.

As my pre-post intervention analysis, I conducted listening surveys and facilitated community engagements through focus group discussions (FGDs), in-depth interviews (IDI), participative observation and CoPs collective voices, key informants, community engagement surveys in rebirth based on varying set questionnaires, journaling, notes and archetypes were other critical methods through which data was gathered. These data-gathering methods became the critical methods of inquiring and investigating on the impact and the effects of the research methodology within FNB Private Wealth Client-Servicing as experienced by this community. The research methods employed within the study are discussed in the following paragraphs. A representative sample of participants within FNB Private Wealth Client-Servicing community were appropriately selected which comprised the correct mix in terms of the community’s demographics and diversity composition selected by Shannon and myself. These comprised varying compositions of community groupings designed in line with the study.

The data-gathering method applied in this research empowered and enabled me to identify and understand the burning issues within FNB Private Wealth Client-Servicing and its related environments. Figure 6.1 below depicts the various data-gathering methods conducted within this thesis presented as pre-intervention investigation, pre-post intervention analysis and data analysis methods.



**Figure 6.1:** Schematic representation of the data-gathering approach

In Figure 6.1 above, the schematic representation of my data-gathering methods employed to gather and analyse data is presented. I ensured that every process conducted within FNB Private Wealth Client-Servicing included Malcolm, the sponsor, Shannon who worked as part of the CoP and co-researcher and the appropriate and appointed elder from the community of elders (CoE). This also included Dr Colin Steyn as an external consultant from time to time.

### **6.12.1 Pre-intervention investigation**

#### **6.12.1.1 Auto-ethnography (oral history and subjective experiences)**

Laubscher (2013) defines auto-ethnography as a form of self-reflection and writing (autobiography) in which the researcher writes about his or her personal experience connecting these experiences to the greater cultural, social and political meanings and understandings in relation to others in society as told in my story in Chapter 2. Makangira (2015) defined oral history as the gathering of personal reflections of events and their effects from an individual or collective. Ellis (1999) agrees that auto-ethnography begins with one's personal life, feelings, emotions and thoughts which allows for introspection and lived experiences. As defined by Makangira (2015) and Ellis (1999), the story of my culture as presented in Chapter 3 reflects both my individual and communal lived experiences on which I reflected, and ultimately birthed REBIRTH as my contribution to the field of study to be applied by other organisations towards inclusive transformation. I use auto-ethnography to investigate and analyse the challenges faced by the case organisation FNB Private Wealth Client-Servicing for me to bring about a solution as an OCD practitioner.

Appendix A shows the greater FNB engagement survey (known as the people's pillar survey) conducted prior to the rebirth transformation journey within FNB Private Wealth Client-Servicing, with a specific aim to first understand their challenges, then to understand insights and learnings and then to understand and check progress and impact in my post-analysis intervention which will be presented in Chapter 9 of this thesis. The plan of collecting oral history and individual experiences enabled me to capture my individual histogram and personal journey. Wolcott (2002) stated that it would be a search of what people in an environment know collectively or individually which informs what they do or what they are already doing. This thesis therefore describes the themes across subjective experiences as well as oral history of the participants with the aim of facilitating interpretation and the creation of a common story (Ellis, 1999).

As told in my story presented in this thesis as Chapter 2, I am immersed in a quest to uncover my Call and authentic identity. I seek to explore my sense of being towards becoming my grounding in the South. It is through my story that my personal Rebirth is conceived. I embark on this personal journey called Rebirth into the South to reconnect to Call through engaging realities of my lived experiences. My Rebirth journey was not an easy one, but it is through my rebirth that I could explore the story of my culture as presented in Chapter 3 of this thesis wherein I delved deeper into my cultural identity. My role within the case organisation allowed me to live and experience my whole being as Organisational Change and Development practitioner through its rebirth. Presented in Chapter 4 of this thesis is the story of FNB which is where FNB realised that there was a need for transformation to which I proposed an organisational transformation journey called rebirth. This rebirth is the journey embarked upon by FNB and where collective oral history and subjective experiences were shared. This became a powerful way of data gathering.

While auto-ethnography may be a powerful source of data gathering, it is important that I am careful in areas where ethical decision may be required to be made. As a researcher, I must ensure that the research I conduct is ethical in nature. This means that research must be truthful, and it is my responsibility as a researcher to ensure that my research and I are trustworthy (Laubscher, 2013). In research, this element of ethicalness is called ethical considerations discussed in Paragraph 6.17.

I follow an integral research path fused with auto-ethnography as a qualitative researcher as told in my story and the story of my culture wherein I was seeking my authentic identity by connecting to my core in the South. The quest of seeking collective authentic identity encompassed the ethical considerations, personally and for FNB Private Wealth Client-Servicing. As I reflect on my personal rebirth journey, deeper meaning of being and becoming come to light, and enable me to cause innovation. Furthermore, I also gathered data through the post-modern voicing and living theory narrative method which is entailed in this thesis in Chapter 8 presented as the researcher's participative observations and collective CoP voices in rebirth. Post-modernistic integral research is conducted through auto-ethnography as I observed and reflected on my personal Rebirth, rebirth within the case organisation and other individuals and communities (Laubscher, 2013).

## **6.12.2 Pre-post intervention analysis**

### **6.12.2.1 Listening survey**

*I believe we can change the world if we start listening to one another again. Simple, honest, human conversation. Not mediation, negotiation, problem-solving, debate or public meetings. Simple, truthful conversation where we each have a chance to speak, we each feel heard, and we each listen well.*

– Wheatley (2000:4)

According to Hope and Timmel (1996), one of the keys to discovering the deepest feelings of local community is deep listening. Listening may be passive or active, and Freire (1983) says that people listen with a clear idea of what they are listening for. These are the issues for which people have the strongest feelings. Hope and Timmel (1996), state that emotion is linked to motivation. I conducted a listening survey within the FNB Private Wealth Client-Servicing community before and during the process of conducting this research. In this survey, various forums were used with varying populations of five members per community structured in the following groupings: community of practice (CoP); community of mixes (CoM); community of experts or elders (CoE); and the greater FNB Private Wealth Client-Servicing Community from which study participants were selected, sampling procedures applied and how the research emerged from the processes and organisational learning gained. As mentioned earlier in this chapter, for the purposes of this thesis I chose to work with one CoP consisting of fifteen members from FNB Private Wealth Client Servicing. A CoP is made up of the following innovation roles according to Steyn (2011):

- i. Reconnoitre – searches the environment to detect changes and alerts the team to new opportunities and new threats (information and radar).
- ii. Navigator – directs the solution search as he or she understands where repositories of knowledge are and knows where to find data bases and pockets of expertise.
- iii. Handyman – controls the operational and logistical functions.

- iv. Shepherd – facilitates knowledge practices within the team by giving equal importance to roles and enhancing knowledge sharing within the team.
- v. Gatekeeper – trades knowledge into and out of the team and creates CoPs.

It is worth noting from the above that this essentially amounted to five members within a CoP, CoM or CoE equating to three CoPs. These roles rotate through the team over time, and are not necessarily fixed roles, but are fluid and alter as the opportunities present themselves and members within the CoPs mature. CoPs elected specific members for specific roles based on their personal strengths and characteristics which they displayed within rebirth and in the work environment. These roles changed or rotated as innovation tasks changed ensuring that no gaps were left open to inhibit the transformation journey. The community status also varies from what were called elders, being more experienced people, to experts, specifically skilled people, to mix of both which included the leadership team.

The various CoPs met daily except for month-end periods where they met at the soonest date possible after month-end. The research schedule distributed to the teams is illustrated in Appendix C of this thesis. Further to these sessions I conducted fifteen interviews with CoP member some of which were recorded by scripting, manual documentation and transcribing. The notes taken during the interviews became useful as the interviews I conducted enabled me to categorise them into themes I had identified. I identified these themes through listening and observing the use of similar words, context, emotions and behaviour. Some of these interviews were video-recorded, conducted in the Xhosa room, coffee area, and specified boardrooms and out in nature on FNB Wealth's premises from which notes were also themed. The interviews which were video-recorded were most useful as I could replay the interviews when in need deeming them critical to the information gathered.

Shannon, as one of the PAR team and co-researcher, remained as an active observer, enquirer and sounding board to validate the authenticity of the interpretation of the data. She also managed key logistical requirements in the process and supported and enabled stakeholder management and buy-in. She came from the FNB Private Wealth Client-Servicing community and had worked within the environment as a team leader and part of the management team for two years, and was therefore able to bring broader context into view. She was also responsible for organising interviews, forums, groups and managing different laminations and from time to time served to take me back to the purpose of the research, thereby managing to keep the focus and research objective on the right approach. Shannon also remained an integral member of providing feedback to the sponsor and the greater leadership team together with me.

#### **6.12.2.2 Community engagement in FNB Private Wealth Client-Servicing**

The community engagement process was based on the Training for Transformation (TfT) approaches as developed by Hope and Timmel (1996) as part of my pre-post intervention analysis. The TfT approach provides activities, group exercises, and pedagogical theoretical foundations for "people to understand and take action in their world" (Hope & Timmel, 2014). Building on Freire's class-based concept of oppression, TfT calls to end liberal capitalism and embrace a "system based on participatory democracy on the political level, and economic democracy built on a deep sense of 'the common good'" (Hope & Timmel, 1999:4 as cited in Krupar and Prins, 2016). Community engagement

within this research involved confidential surveys to identify and define the community problem and engage deeply in discussion with the greater FNB Private Wealth Client-Servicing community.

Rebirth raises corporate consciousness through community engagement and collaboration and thereby attaches significant value to the human aspect where feelings, values and spiritual beliefs are continuously encouraged and enabled to surface. Rebirth also becomes a platform for rational and collaborative engagement towards shaping the greater FNB 2025 vision through innovation. In these community engagements, I included CoPs, CoMs and CoEs as well as stakeholders and the FNB Private Wealth Client-Servicing community at large comprising both internal as well as external clients to analyse the BU's challenges. These engagement processes were designed to create critical consciousness around the nature of the challenges and ways in which these communities could tap into their Southern spiritual connection through grounding to their Southern origins to stir deep transformational being and becoming towards causing inclusive transformation and realise their mandate towards the greater FNB 2025 strategic vision.

The community engagements took place at various venues. Some were out in nature, formal and informal, structured and unstructured, and flowed in natural socio-cultural settings. Some took place at employees' personal desks, the Xhosa room, cafeteria, coffee areas, boardrooms, telephones, and sometimes in homes and natural settings. Rebirth celebrations and ceremonies organised by me and some CoP members also became critical for community engagements. I observed these engagements with a subjective eye to draw deep-seated spiritual practices. Art and creativity were the core methods of these community engagements.

The CoPs had worked on an innovation video which demonstrated the fast pace at which technology was advancing in the global sphere. This video also demonstrated the greater FNB's innovation journey, and encouraged a new collective vision for FNB Wealth to thrive towards inclusive transformation and innovation. The video prompted interactive engagement from all participants, and enabled them to express their creativity through sharing of ideas which also created awareness of rebirth. This was to follow through the essence of these practices, and how this essence could be a reservoir or potential for Organisational Change and Development granting me the platform to engage with the FNB Private Wealth Client-Servicing community at large in this process.

### **6.12.2.3 CoPs and focus group discussions**

Focus group discussions (FGDs) are a form of interviews that involves open discussion(s) between selected persons for a specific purpose. A focus group is a form of qualitative research in which a group consisting of six to ten people explore their attitudes towards a certain topic as smaller groups of people are manageable, and are easier to gain insight on various perspectives (Krueger & Casey, 2000). The focus group interviews provide time and a cost-effective manner for collecting qualitative data in a situation where a one-shot collection is necessary (Berg, 1998). Through FGDs, broad and relevant data is generated from different research participants. To ensure that qualitative data was generated in as open-ended and deliberative way as possible the FGDs were arranged in a way that an open and enabling environment was provided to promote active participation by all the invited participants. I set ground rules for engagement emphasising upfront so that each participant had a right to voice openly, be heard and to be given time to speak out.

Three FGDs were held with nine participants from FNB Private Wealth Client-Servicing. I was present at each FGD as researcher, research coordinator and an external observer. These FGDs consisted of the following BU leaders: (i) The head; (ii) a senior manager and manager; (iii) two team leaders and (iv) four Client-Servicing consultants who also formed part of CoPs within rebirth. During FGDs, scheduling data was collected in addition to the actual statements made by the participants using templates created by the researcher for collecting information. This allowed for each participant to respond, and the observer to clearly understand the characteristics of the response, non-verbal communication used, interaction patterns, the degree of consensus and dissent and characteristics of dissenters. Collection tools increased the rigour of the focus group research outlining observational frameworks. These innovative strategies assisted me in formulating informed choices for collecting data.

I facilitated FGDs by taking notes to create new questions for further discussion and laminations, ensuring the recording of each session which I then went on to transcribe. Data gathered from FGDs included text from participants including interaction data, group data and individual data. The gathering of data was beneficial in understanding the themes and categories which signified the shifts in talk and thought which was reflected during FGDs as generated by group dynamics.

These FGDs were also conducted by using the Delphi technique. According to Hsu (2007), Delphi is an accepted method for gathering data from respondents within their domain of expertise. Hsu, further states that Delphi technique is designed as a group communication process that aims at conducting detailed examinations and discussions of a specific issue for goal-setting, policy investigation or predicting the occurrence of future events through surveys, questionnaires and discussions. Delphi will especially question rebirth as a service orientated approach, and will focus on how this process can enhance service levels of client quality delivery, increased productivity, increased reputational capital to the brand and FNB Private Wealth Client-Servicing, as well as how complaints can be eliminated and customer compliments can be increased.

The FGDs always lifted the veil on the conversation and discussions as participants were consistently challenged to lift their consciousness and thinking by tapping into their core, and work with the new narrative from the South and begin to see their challenges through the lens of the rich leadership and community norms of the South ensconced in symbols, story-telling and rituals like dance. The CoPs together with me sang, performed symbolic dances and drew learning from examples set in the Southern culture. Hope and Timmel (1996:78) state: "Problems are like weeds. If we only cut off their heads, they will soon be back, but if we dig deep and get out the roots, they will not grow again. So, the animator aims to get down as deeply as possible with the group, to root out the causes of the problem." A feedback overview of solicited data is presented in Chapter 8.

I consciously managed time to ensure that there was equal airtime for participant engagement allowing three hours for each session. A pliable or semi-structured interview schedule was used to allow for deeper probing and discussion of unforeseen issues (see schedule in Appendix C). Very often participants brought in issues that were not directly linked to the research focus, but space was created for such issues to be discussed as I understood that from such discussions, useful insights could be developed regarding their contribution towards the rebirth transformation journey as deployed within FNB and their commitment to engage authentically. In situations where the participants felt heard at a personal level and empowered to work through their personal change

systemically and to transform their situation, they started to see the link between what is perceived as a personal separate issue and work life, and thereby creating an ecological shift. This enabled them to approach life as whole beings, and not as parts of a being thereby creating a significant shift in identity and the value they hold within that identity. This meant that I spent a lot of private time coaching and counselling individuals and small groups (where applicable) at a personal level to cause mind-set and behavioural change.

At the close of each focus group discussion, the principle themes and issues in relation to the innovation management and learning were summarised by the researcher to verify accuracy in interpretation and to obtain group confirmation. The analysis and interpretation of focus group data analysis added diverse unexpected dimensions of group context. The qualitative data generated was analysed by using the grounded theory method of analysis commencing with the recording of notes relating to the focus group discussion, and concluding with the writing up of the process.

#### **6.12.2.4 In-Depth Interviews (IDI)**

In-depth interviews (IDI) are commonly used in qualitative research of various disciplines to gather research data (Polkinghorne, 2005). Marton (1994), says that IDIs are data-gathering methods for phenomenological studies. Daniels and Cannice (2004) state that interview-based research studies are particularly well suited for exploratory and theory building studies (as cited in Viljoen, 2008). IDIs are best suited for small numbers of participants as IDIs provide “in-depth” information about people, their experiences and insights by means of rigidly structured questionnaires (Viljoen, 2008). As such, data gathered from IDIs was of a phenomenological nature and used extensively in this thesis to explain the experience between the various CoPs in respect of the rebirth transformation journey (Viljoen, 2008).

I was supported by an external interviewer, Dr Colin Steyn, who is a doctor in innovation who also conducted in-depth interviews (IDIs) with the sponsor and business unit heads. Dr Steyn’s role was that of an external consultant who observed and engaged in rebirth from time to time which included IDIs. The sponsor’s direct leadership spread across core delivery areas, team leaders, consultants, regional heads and a core member in their teams. Dr Steyn identified bankers, CoPs, CoEs and external customers to understand the experiences individually and holistically of FNB Private Wealth Client-Servicing and the service it provided and the impact thereof in terms of innovation and delivering a seamless client experience. These groupings gave their understanding of the current reality and why a new methodology and frame for transforming the environment had become necessary. Interviews were conducted on an on-going basis, usually taking between 40 minutes to one hour, dependant on the interviewee response and the context of the interview in terms of the stage in the transformation journey questionnaire titled rebirth innovation diagnostic in Appendix D.

Solicited data on the IDI forms part of Chapter 8. For instance, initial interviews took place prior to the implementation of the rebirth transformation journey through personal innovation profiling as can be seen in Appendix E of this thesis, with specific focus in the line of questioning being on personal strengths and challenges in adapting to transformation and innovation. Following that on-going interviews were conducted more specifically with the CoPs and other individuals from the BU to gauge progress in the journey and to understand possible shortcomings and challenges. I identified fifteen key individuals (leadership and consultants) who represented all demographics in terms of knowledge,

education, work experience, and particularly those who lived the spirit and intent of *Botho-Ubuntu* on which the rebirth transformation journey is premised.

Thereafter, I conducted interviews with leadership and the greater Client-Servicing which I identified; both in groups and as individuals to check on the observed outcomes, gaps, challenges that remained or that had emanated from the proposed value proposition. I conducted four in-depth interviews which were broken down in the various phases which consisted of a minimum of four members at any given session within the rebirth transformation journey (see Appendix B). Further to this, and as indicated earlier in this chapter, in most instances interviews were conducted at the work premises, but I would on some occasions conduct interviews off-site like at the coffee shop or at the FNB conference venue in Sandton and sometimes outside in the office park garden. The interview processes served two purposes. Firstly, they assisted in gathering new and very valuable data relating to FNB Private Wealth Client-Servicing's rebirth transformation journey and their varied interpretations of the reason for its existence. Secondly, they assisted with on-going and reflexive triangulation of data within the research processes contributed to the trustworthiness and validity of this research (O' Leary, 2004). Data that was generated during the processes was recorded either by manual transcribing or by means of video-recording and then later transcribed to document form.

#### **6.12.2.5 Participative observations and collective CoP voices in rebirth**

Mason (2002:84) uses the terms, "observational and participatory methods of generating qualitative data." She states that the terms "observation", and in particular, "participant observation" refer to methods of generalising data which entail researchers immersing self in a research "setting" so that they can experience and observe at first hand a range of dimensions in and out of that setting (Makangira, 2015). These include social actions, behaviour, interaction, relationships, events and spatial, locational and temporary dimensions. Mason (2002:84) suggests that experimental, emotional and bodily dimensions may also be part of the frame. Mason (2002) considers observing and participating as data-generating methods without assuming them to be necessarily connected to any overall approach.

Schmuck (1997) states that observation as a method of data collection is useful to researchers in a variety of ways. Observation provides researchers with ways to check for non-verbal expression of feelings, determines who interacts with whom, grasp how participants communicate with each other, and check for how much time is spent on various activities. I conducted observations as a participant observer where I immersed myself into the case organisation's rebirth transformation journey, experiencing and recording it by means of journaling (Lessem & Schieffer, 2009) and (Wolcott 2002). In Chapter 8 of this thesis I present my journaling for the period June 2013 to December 2014 presenting my observations for the said period wherein I captured the rebirth transformation journey towards inclusivity and innovation within FNB Private Wealth Client-Servicing. The observation occurred during working times sitting in various team meetings, sitting and working within the FNB Private Wealth Client-Servicing environment. It is also through my observations that I could hear the voices of the CoPs, linking what was being said to what I was observing and ultimately, what was transpiring on any regular day in this BU.

Engaging the different stakeholders on their experiences of working with Client-Servicing, attending quarterly award sessions, conducting coffee sessions, open forums, being part of and participating in change processes and workshops also occurred during the rebirth transformation journey. I also

accompanied the business sponsor on his road shows and attended official and unofficial celebration gatherings. Golafshini (2003) supports the notion of a researcher's involvement and immersion into the research by discussing that the real world is subject to change, and therefore the qualitative researcher should be present during change to record an event before and after the change occurs. I prepared the observation schedules beforehand and included columns with such headings to capture visual aspects, the physical context, body language, facial expressions and emotions (Leedy & Ormrod, 2007) and (Lee, 1999). Furthermore, I had write-ups of observations made during interviews. Significant processes of how the participants experienced the process of transformation as captured in this chapter were duly recorded and transcribed.

It is argued by Leedy and Ormrod (2007) that observations do not capture what they should because notes are often insufficient to capture the richness of what one is observing. Makangira (2015) states that when a camera is used it only captures events happening in a particular direction and participants are usually uncomfortable in front of cameras and for recordings. In this research, the observational data was used to give context to the answers given in the interviews. For example, additional notes were taken where the interviewees displayed their feelings or emotions and noted as such. However, the challenge in observation is the critical distinction between observed and inferred data (Makangira, 2015). Makangira (2015) earlier criticised the method of observation saying that it consisted of an external view of something. When observation concerns the world, a problem arises because the observer is part of the world being observed. This problem then concerns not only the perception of the objects, but also the observer (that is the way in which observed objects are observed). It is also important to note that the mere presence of the researcher may modify what participants say and do (Leedy & Ormrod, 2007). I was, however, able to identify inconsistencies in participants' words and actions within the rebirth transformation journey.

Within rebirth, as critical observer and participator, I was able to capture the rebirth transformation journey from its core in the South through video-recordings and pictures being taken of the CoPs allowing me to critically observe and journal this process. I also noted that some CoP members behaved differently while observing them in their work environment as compared to their approach and demeanour within rebirth flagging inconsistencies. The phenomenological approach to observation is premised on the basis that some relationships or effects will exist between the observer and the community or individuals (Makangira, 2015). The approach also assumes that reality as perceived by humans is a product of the human mind and any effect on that reality will modify the reality. Figure 6.2 below is a collage of pictures and a video clip taken during the rebirth transformation journey illustrating my ability to capture, observe and journal the journey.



**Figure 6.2:** Some of the moments captured in the rebirth transformation journey (Researcher, 2014)

In Figure 6.2 above, it can be seen how I went about capturing some of the moments within the rebirth transformation journey, which in turn allowed me to be a participant and an observer of this journey. I present Figure 6.2 clockwise starting with the picture of some of the CoP members on their first day of rebirth in the top right corner. The bottom right picture is that of a video clip wherein Shannon was giving her experience of the rebirth transformation journey. The picture in the bottom left corner is that of me captured by one of the CoP members with my researcher’s observation notes in hand. In the top left corner is a picture of the CoP during one of the critical challenges they were dealing with during rebirth. Figure 6.2 therefore supports Schmuck’s (1997) view on observation as a useful means for data gathering.

#### 6.12.2.6 Key informants

Terre Blanche and Kelly (2004:133), define a key informant as, “somebody you get on with who is part of and knows the culture you are studying and likes talking about it.” Gall, Borg and Gall (1996:306) are of the view that key informants are individuals who have special knowledge or perceptions that would not otherwise be available to the researcher. Key informants often have more knowledge, effective communication skills or different perspectives than other members of the defined population. Neuman (2000:374-5) considers an informant or key actor in the field as a member with whom a field researcher develops a relationship, and who tells about, or informs on, the field (Makangira, 2015).

I identified two key strategic leadership and three strong change agents from the CoP to be my key informants within the study. These five individuals and the remaining CoP of ten members provided the link between different teams and their cultures within FNB Private Wealth Client-Servicing. Although they were part of the environment and its culture, they nonetheless had the capacity to separate themselves from the environment and its culture to give an objective view of events taking place in shaping or influencing the environment. I also refer to these individuals as knowledge workers. I had to be careful in choosing key informants. Gall et al., (1996:306), warned that some informants might be very unpopular in their contexts and this might impact negatively on interviews.

It is also very critical to validate stories to avert and manage subjective views founded on bias or propaganda (Makangira, 2015). I spent considerable time with knowledge workers, individuals and groups but more importantly, I dedicated weekly engagement sessions with the BU Head and sponsor, Malcolm Horn, and his direct reports to distil from their wisdom as leadership and to ensure that risks were being proactively managed, and sharpening the research methodology as it was time to relook at the process and the lessons learned from each process facilitated. Each time these engagements finished, the sponsor and BU Head would say: “I wish I had known the rebirth transformation journey and Southern way of leadership much sooner in my life – rebirth is life.” This statement is evidence of an integral shift that may result from engaging a holistic transformational method integrating nature, science, spirit and enterprise (Matupire, 2014).

#### **6.12.2.7 Journals**

Journaling is another form of data gathering in qualitative research (Ortlipp, 2008). Journaling in this research was critical for me to get deep insight on the case organisation, the CoPs and the overall transformation journey. As discussed in Paragraph 6.12.2.5, as I observed the journey, I took notes and journaled what was transpiring. According to Ortlipp (2008), journaling creates transparency in the research process and explores the impact of critical self-reflection. As a result of self-reflection, I used journaling as a data-gathering method, not only as the researcher, but also for CoPs to write down and reflect on rebirth and the impact it has had on the lives at home and work. I therefore used journaling throughout this research to map, grow and understand my role as researcher, interviewer and interpreter of the data (Ortlipp, 2008).

#### **6.12.2.8 Notes**

As presented in the data-gathering method above, taking notes pre-post investigation and analysis contributed significantly to this research as it is from various forms of notes that I was able to write this thesis (Bryman and Burgess, 2002). I wrote pre-research notes, field notes, interview notes, structured and unstructured notes and observational notes as and when I experienced what I could see, hear, smell and touch (Bryman and Burgess, 2002). These notes are the core of this thesis as they form the foundation of this research from which the chronological order of this thesis is based. Furthermore, these notes enabled me to diagnose, structure, theme, analyse and interpret data gathered from this research. Notes are discussed further in Paragraph 6.13.2 to follow.

#### **6.12.2.9 Archetypes**

I first introduced archetypes in Paragraph 2.5 as per Jung’s (1953) and Myss’ (2001) definitions. Archetypes as described by Jung (1953) are “a kind of readiness to produce repeatedly the same or similar mythical idea;” further stating that, “archetypes are pre-existent form [s]” (Jung, 1953:6). In Paragraph 3.2 I delved deeper into the purpose of archetypes within the context of my story and the story of culture as I critically analysed which archetypes I needed to embrace and which to dispel in order to Rebirth. It is through my self-reflection that I identified archetypes as a transformative tool within the rebirth transformation journey in FNB Private Wealth Client-Servicing. Archetypes are contextualised further in Paragraph 7.20 with their use in rebirth as adapted from Ackoff (1971) also presented therein.

### **6.13 Data analysis**

Data analysis is a significant part of the research process to arrive at findings (Martins, Martins and Viljoen, 2017). Maxwell (2002) suggests that data analysis involves reducing data gathered into a feasible size, developing summaries, identifying patterns and applying statistical analysis. As this study is qualitative research, data matching and data analysis were used. Data analysis consists of examining, categorising, tabulating or otherwise combining the evidence to address the initial proposition of a thesis. My challenge with integral research is that it brings about a large quantity of notes from interviews, video-recordings and all other documents of records which must be entirely analysed (Viljoen, 2008). The analysis therefore becomes disorganised, as data cannot be easily classified into neat categories or themes.

#### **6.13.1 Step 1: Organising data**

Based on the data-gathering methods applied as presented in Paragraph 6.12, I approached this research with the intent of contributing a meaningful and purposeful solution towards inclusive transformation, identity and social innovation in FNB and bringing a solution which could be applied by other organisations. I based the data analysis on grounded theory framework drawn on my own theoretical background and history to inform the analysis.

#### **6.13.2 Step 2: Description**

After the completion of data collection, the data was edited, coded, classified and tabulated. Since the purpose of editing is to detect errors and omissions; careful inspection of notes and responses from the community at large was done by me (Kothari, 2006). Since coding is necessary for efficient analysis, coding decisions were made during the designing stage of the interviews and discussions. Kothari (2006) described the purpose of coding as, “to assign the items in certain categories” and these were categorised per the items based on the stated objectives. All the FGD discussions were semi-structured but guided by a script affording me the opportunity to explore interesting issues in depth. I conducted these in English as it is FNB’s preferred professional language. With me being from the South, I could easily identify with emotions and feelings of the participants and CoPs. Interpretation of the information was therefore easy. I recorded notes of all the IDIs and FGDs in these discussions.

I read through all notes I made to analyse this fairly disorganised data which enabled me to identify key themes and issues. Analysed data in this transformation journey was presented in the form of a thematic presentation. The data analysis was based on certain themes detailing each of their implications in the path towards organisational change and development through rebirth. Results, findings and recommendations of the study are also presented in Chapter 9 in detail. The captured information was later elaborated on and compiled into a comprehensive record and placed in tabular formats divided into the themes identified. These themes were used again in the results, findings and recommendations in Chapter 9 to confirm the efficacy of the rebirth transformation journey. Hereunder I highlight the steps I followed to ensure quality of the study.

Some CoPs wrote stories and songs which enriched relational themes, and brought out deep feelings within the community as well as their desires within the rebirth transformation journey. Story-telling and song will be discussed in detail in Chapter 7 wherein the rebirth transformation journey is presented. Feelings and messages of gratitude were also displayed publicly on the “hashtag” boards, sparking an exciting ambiance across the environment. I also made use of an external consultant and leadership in sounding out the line of questioning to be applied in the interviews as well as agreeing

the process and line of focus. A rebirth and innovation diagnostic questionnaire was distributed to the CoPs requesting them to complete it as objectively and truthfully as possible. The purpose of the questions contained therein was to establish the innovative culture and climate within FNB Private Wealth Client-Servicing.

Some scholars have argued that classifying can assist in reducing large volumes of raw data into similar groups to identify common themes (Brown and Dowling, 1998); Dawson (2003) and Kothari (2006). I classified the data gathered into groups based on common characteristics and/or themes focusing on the stated objectives. Data was extracted from the completed questionnaires with points totalled for each theme. This data was completed on a spread sheet using Microsoft Excel (2010) version. The available response options which could be selected were written horizontally and the questions asked were listed vertically. Points were allocated based on a scale of 1 to 5, where a score less than 3 was negative and a score more than 3 was positive. The allocated points were then averaged out for the various themes and ultimately analysed as the overall average response. Microsoft Excel 2010 further prepared the analysis with final output – a copy of this analysis; “Data for Assignment 2 – 2014” is available on request for interpretation.

### **6.13.3 Step 3: Interpretation**

Emergent from the analysed data, my observations and the classification of themes identified also helped me to focus on key events in the rebirth journey within the case organisation. I arranged the findings per themes and topics and drew out key issues from the participants. The aim here was to be faithful to the participants, and to be aware (as far as possible) of biases being brought about by the inevitable editing which is needed. There is an ethical issue about misrepresenting, distorting or deleting findings which have been provided in good faith by participants, “treachery,” per Plummer (2006). This part of my research report involves some interpretation and conjecture to decide what to select and how to express and put it in order, but its key role is to describe rather than explain. The findings are reported robustly, including direct quotes from participants to illustrate points (Connell, 1985).

### **6.14 Triangulation**

I looked at recurring patterns of events and actions of the participants experiencing rebirth. Creswell (1998) and Guba and Lincoln (1988), argued that many qualitative researchers believed that there was not necessarily a single, ultimate truth to be discovered. Instead there may be multiple perspectives held by different individuals, with each of these perspectives having equal validity or truth. Denzin (1978:291) defines triangulation as “the combination of methodologies in the study of the same phenomenon.” Thurmond (2001), states that the purpose of triangulation is to explore various types of triangulation strategies, and to indicate when different types of triangulation should be used in research. The intent of using triangulation is to decrease, negate, or counterbalance the deficiency of a single strategy, thereby increasing the ability to interpret the findings. Furthermore, Thurmond (2001) found that triangulation is the combination of at least two or more theoretical perspectives, methodological approaches, data sources, investigators, or data analysis methods.

Per Thurmond (2001), the use of triangulation strategies does not strengthen a flawed study. Researchers should use triangulation if it can contribute to understanding the phenomenon. However, they must be able to articulate why the strategy is being used and how it might enhance the study. In

qualitative research, triangulation is used to strengthen credibility and validity of the results (Viljoen, 2008). Data triangulation (Easterby-Smith, Thorpe and Lowe 1991) was used as a strategy for improving the reliability of the research findings as the methods converged to ensure fit and relevance (Makangira, 2015).

In this research, the data-gathering methods listed in Figure 6.1 assisted me to validate and cross-verify my findings as triangulation in this research was used to support the credibility of the study. Data-analysis triangulation is the combination of two or more methods of analysing data. These techniques may include different families of statistical testing or different statistical techniques to determine similarities or validate data (Kimchi et al., 1991). I analysed the data gathered by grouping my findings derived from my pre-intervention investigation and pre-post intervention analysis which gave better understanding and meaningful findings. To ensure validity and relevance of the findings; I took the research back to the participants for their validation (Trochin, 2006). The participants accepted that their voices were presented truthfully in this process of validation rendering it reliable.

#### **6.15 Delimitation of PAR using IRA**

PAR can be defined as a form of learning in action. Lessem and Schieffer (2010) further state that it is a new philosophical fusion of action and knowledge. PAR is mostly effective when applied to bring about social innovation as a transformative action for communal problems solving to promote communal self-reliance and alleviate communal and environmental decay (Makangira, 2015). I experienced numerous challenges within the case organisation in this research, but the key challenge was that of taking a qualitative integral approach. This challenge was brought by people not understanding what phenomenology in the context of integral research is, and thereby expecting parameters like the conventional quantitative research to apply. Makangira (2015) states that:

“a fairly common comment concerns sample size - it can be hard to get over to people that a PAR sample is valid - and there can be confusion between methods such as theoretical sampling used to ensure that participants are drawn from a spread of contexts, and statistical sampling which is concerned with quantitative reliability and often with differences between contexts (Glaser & Strauss, 1967).”

It is by using PAR that deeper interpretations and meanings of self, community and current circumstances may be derived. These interpretations may have more effects in the future – spiritually, culturally, socially and economically. Stemming from deep understanding and informed interpretation of culture, past and present, as well as other cultures and people around the world, there is the ability to envision the kind of people individuals and communities would like to become (Makangira, 2015). I engage my total self, personally and collectively, in passionate involvement with a challenged community and contaminated environment. I portray these in richly descriptive terms, depicting vividly what I intimately hear; see and feel, with a view to drawing out the originality and intensity, of such, with a view to ultimately transform such nature and communities (Makangira, 2015).

#### **6.16 Quality criteria**

Data quality refers to the reliability and validity of findings as the outcomes of the research, and how I went about ensuring the quality of data used. The judgement of data quality should be based on

actual strategies applied in collecting of data, coding and analysis (Glaser & Strauss 2007). As a qualitative researcher, I attempted not to simplify what I observed and experienced. Instead, I put in more effort which channelled me into recognising that the deploying of rebirth and how it was experienced was multifaceted in which I also attempted to portray the process in its various forms. The processes provided a means for triangulating data that had been generated through other data collection processes. The criteria in evaluating this research involved data fit of participants, credibility, originality and relevance (Charmaz, 2006) and Glaser (1978). The criteria in evaluating this research involved the below as per (Charmaz, 2006) and Glaser (1978):

- i. Data fit of participants
- ii. Credibility
- iii. Originality and
- iv. Relevance

Data fit demands that the theory must fit the world it seeks to analyse, meaning that the people participating in the research ought to be 'fit' to participate (Glaser, 1978). Credibility in qualitative research aims at creating trust, respect and accountability (Botha & Schutte, 2003). This means that to ensure credibility, the researcher must be familiar with the research topic and research setting. Originality in research, according to Charmaz (2006) should present a unique value proposition which will be significant theoretically and socially. The unique value proposition should be able to be challenged, extended, or improve current ideas, concepts and practices in society. Relevance refers to whether the participant's authentic issues have been addressed in the research and whether the research provides the solution to resolve these issues (Charmaz, 2006) and Glaser (1978). In Chapter 10 I will discuss how fit of participants, credibility, originality and relevance was achieved.

I ensured that all the important and relevant data was captured. Data collection was done by means of both surveys and interviews. For surveys, these were performed across the business area, across the CoP groups and across leadership. I made use of an external consultant as well as leadership in sounding out the line of questioning to be applied in the various focus group discussions and in-depth interviews, as well as agreeing the process and line of focus (Appendix C, D and E). During the FGDs, the FNB Private Wealth Client-Servicing community was requested to articulate in writing and by posting on a message wall their first-hand experiences on the impact of this change and how their lives were affected both at communal and individual level.

I made much of an effort to minimise effects on the people under the research by not putting words in their mouths or appearing like I knew more than anyone else, as part of the participants and recorded their interpretation of the rebirth in the form of write-ups and observational notes. These write-ups and observational notes were edited, transcribed and then analysed. Rasmussen (1998) states that phenomenology focuses on things as they seem to be and not necessarily as they are, and that the meaning content of the subject can be expanded by viewing objects from several different angles and directions, with the sensory data experienced about such objects gradually combining to form a synthesis. This data was generally observational, subjectively interpreted and contextually specific Makangira (2015).

It is fair to say depending on the nature of study or research, gaining access to participants for a session of just an hour or even less may be challenging. This is even more so when the participants involved are not authentically engaged in the research itself and do not trust the efficacy and authenticity of the process. As with any financial (banking) institution there is always a need to also quantify the value of research like in the case organisation in which this research was conducted. With the banking sector being mostly inclined to left-brain thinking what does not fall within the parameters of the left brain is judged and interrogated in relation to its value. The findings therefore tend to be a compromise where a phenomenological approach is used, but the methods used are more structured and contrived than is ideal (Makangira, 2015). A phenomenological approach gives rise to other people's voices ensuring that they are heard which also makes this approach an effective way of surfacing deep transformational issues. As a qualitative researcher, this study enabled me to present a written research observation report which included the voices of the CoPs, my reflexivity, the complex description and interpretation of the stated research questions and my contribution to the field of study (Creswell, 2013). This report is also presented in Chapter 8 of this thesis.

### **6.17 Ethical considerations**

One of the most crucial factors a researcher must consider in his or her study is the ethics of the research. Ethical considerations create trust and reflect a researcher's professional demeanour and true intent for the research (Steane, 2004). Furthermore, these considerations affect the participant's responses and ultimately, the research outcomes. Viljoen (2008) lists ethical concerns for researchers as discussed by Diener and Crandall (1978) as follows:

- i. Harm to participants
- ii. Lack of informed consent
- iii. Invasion of privacy
- iv. Whether deception (for example, ethical transgression) is involved

Laubscher (2013: 206-207) explains that according to Prof Schurink,

"...local university departments like the Department of Industrial Psychology and People Management (IPPM) of the University of Johannesburg (UJ) and business schools, auto-ethnography as research strategy is accepted when in addition to lived experiences of the researcher, experience of others who had similar experiences and relevant scholarly literature is used..."

Within this research, I received informed consent from individual, CoP and the case organisation. As explained in Paragraph 6.12.2.2, the community engagement process was based on the Tft approach which involved confidential surveys to identify and define the community problem and engage deeply in discussion with the greater FNB Private Wealth Client-Servicing community. In other questionnaires and surveys, the CoPs had a choice of remaining anonymous or disclose their details; thereby allowing them to make an informed decision in respect to their responses.

## 6.18 Conclusion

In this chapter I presented the research paradigm followed by the ontological and epistemological basis for this thesis's research methodology. Methodological assumptions were also presented together with IRA after which qualitative research was discussed. The research method applied in this thesis being PAR through IRA was outlined with the description of PAR, and how it influenced the research paradigm and methodological assumptions. In this chapter, the second part of the third C of the 4C integral journey being Co-creation was presented. I presented Integral Research Approach (IRA) as the research method followed by the research design, the Four World perspective and research paths which were applied within this thesis. IRA through grounding, emerging, navigation and emancipation (GENE) steps as adapted from Lessem and Schieffer (2012) were also presented.

This chapter was therefore integral delved into my research sampling, data-gathering methods, managing the quality of data collected and how the data was analysed and processed. Furthermore, I presented the process of triangulation and how it was applied in the case organisation, quality criteria and ethical considerations as necessary to validate this research. The fourth and final C of the 4C integral journey within the research will now follow in four parts, namely Chapters 7, 8, 9 and 10.

In Chapter 7, I present the rebirth transformation journey which is the value proposition and solution I deploy and facilitate within the case organisation FNB Private Wealth Client-Servicing; towards transforming this BU in an inclusive manner. The REBIRTH transformation journey becomes a unique African value proposition which I designed to cause integral transformation through repurposing of self, other, community and the larger world to embrace the gift and latent power in engaging authentic identity and the gift of *Botho-Ubuntu*.

## CHAPTER 7: Effecting rebirth - Intervention

*I think there are good reasons for suggesting that the modern age has ended. Today, many things indicate that we are going through a transitional period, when it seems that something is on the way out and something else is painfully being born. It is as if something were crumbling, decaying, and exhausting itself – while something else, still indistinct, were rising from the rubble.*

-Havel (1994: 26)

### 7.1 Introduction

Contribution is the fourth and final C of the 4C integral journey presented in this thesis in four parts consisting of Chapters 7, 8, 9 and 10 respectively. Chapter 7 represents the first part of Contribution. In this chapter, I position and explain the meaning of rebirth as an organisational transformation journey and what it entails. Now that I have been called to bring about a transformational solution towards turning this BU around, I propose a solution based on the analysis of the case and my grounding call as rebirth becomes my intervention within FNB Private Wealth Client-Servicing. The rebirth transformation journey seeks to effect and contribute a new Southern value proposition in transforming the case organisation's ecosystem and its greater ecology. In this chapter FNB Private Wealth Client-Servicing embarks on a journey to rebirth towards good to Great (Collins, 2001); stemming from the FNB Private Wealth strategy being: (g2G100<sup>813</sup>) which means good to Great with one hundred thousand new private wealth banked clients with eight bank products per household and being the number one bank three years in a row towards achieving the greater FNB 2025 Vision (FNB Private Wealth report, 2014). This transformational journey is through PAR as previously discussed in Chapter 6. Rebirth as organisational transformation journey within FNB Private Wealth Client-Servicing is presented as my post-intervention investigation which examines the impact of my Contribution in the field of study being REBIRTH for the period (2013-2015).

Furthermore, I discuss the research purpose to explore the value proposition of embarking on the rebirth transformation journey as a key strategic driver towards realisation of the greater FNB 2025 vision. PAR, in this thesis is the integral methodology for transforming the organisation towards becoming innovation catalyst and being a market leader (Senge et al., 2004). This approach is in line with the greater FNB 2025 vision precipitating a need for the entire FNB ecosystem to organically transform its culture to achieve its 2025 strategic vision through eight strategic levers being: (i) People; (ii) Trust; (iii) Suite of business lines; (iv) Scale; (v) Angst differentiation; (vi) Electronic and mobility race; (vii) Ecosystem and (viii) Sortedoutness (Celliers, 2014). This vision becomes the trigger for FNB Private Wealth Client-Servicing to embark on this transformation journey precipitating a strong focus on people; as it takes people and not machines to innovate (Best, 2010).

### 7.2 Method of case analysis

Looking at the challenges with which the case organisation FNB Private Wealth Client-Servicing was faced, it became important for this BU to be holistically analysed and a solution proposed which could cohesively integrate technology, innovation, people and systems (Da Vinci Institute TIPS™ framework). Informed by the greater FNB 2025 vision, and the new vision that the FNB Private Wealth Client-

Servicing leadership in collaboration with its greater team created, it was driven by the philosophy “I Care, I Can, and I Commit.” In line with this philosophy I physically analyse the case using causal loops as adapted from Senge (1990). Within this analysis I further integrate the following diagnostics being systems thinking as per Senge (1990), Beck and Cowan (1996) spiral dynamics; Oates (2006) 6Ps model and the Da Vinci Institute TIPS™ framework of technology, innovation, people and systems all of which will be explained in detail later in this chapter.

My analysis of the case is influenced by action research which focuses on research in action rather than research about action (Coghlan & Brannick, 2005:4). Its distinguishing factor is that in action research researchers have full academic freedom to use any stylistic elements they wish and often the ethnography and narrative forms are also used in writing action research reports (Dickinson, 2011). Action research is therefore used within this thesis. Although it is not traditionally PAR, action research together with PAR was used in the form of methodology, and this is how the analysis will be done as pre-to-post intervention. The design journey follows Senge’s (1990) systems thinking and archetypes as adapted from Ackoff (1971). These are the tools that I used when I was called into the head’s office which I begin to discuss in paragraphs that follow.

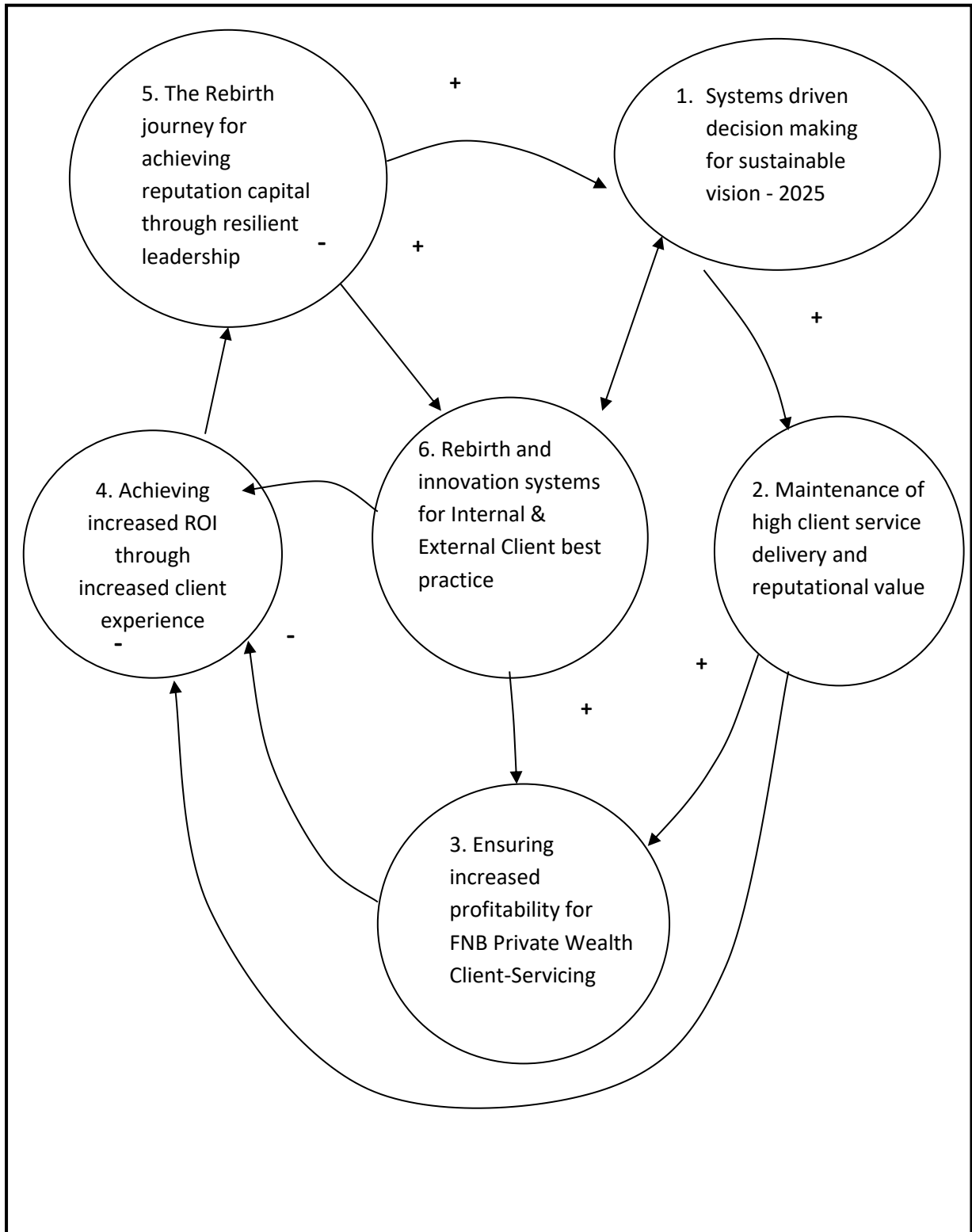
### **7.3 Systems pathway for rebirth**

The rebirth systems pathway is adapted from Senge’s (1993) systems thinking and is a conceptual framework which allows people to understand how things, parts, people and events influence one another within the system as a whole; and to see problems as multifaceted. Systems thinking is the fifth discipline that integrates personal mastery, mental models, shared vision and team learning disciplines by fusing them into a coherent body of theory and practice (Varođlu, 1997). Systems pathway for rebirth thus becomes a focal tool for a mind shift towards achieving inclusive transformation through rebirth.

The rebirth transformation journey is a journey towards inclusive transformation which occurs within a homeostatic structure where the major servicing challenges become apparent and are presented for creative problem solving. It is within this context that disruption continuously happens, and within the FNB Private Wealth Client-Servicing case, disruption is the challenge of service delivery that needs to be advanced and the achievement of the greater FNB 2025 strategic vision. As more deconstruction and reconstruction occur within operations; processes and people management, the bifurcation creates more chaos (Lessem et al., 2014). The FNB Private Wealth Client-Servicing leadership could drive inclusive transformation within this BU through new learning, and should receive specific attention if this BU is to become successful in capitalising on the value of rebirth as organisational transformation journey.

As an OCD practitioner within the field of study, I propose the rebirth transformation journey as a solution within the case organisation to address its challenges and realise the greater FNB 2025 vision as presented in the Story of FNB in Chapter 4. Since arriving in this BU in 2011, I have been actively involved in the change management process of the case organisation within which I identified the need for transformation to increase standards of client service delivery effectively and efficiently and retaining FNB’s reputational capital. In Figure 7.1 below, a systems pathway and methodology for the rebirth transformation journey are presented to achieve resilient people in a collective process of inclusive transformation as a causal loop diagram (CLD) as adapted from Senge (1990). Figure 7.1

presents the current state of FNB Private Wealth Client-Servicing prior to the rebirth transformation journey being embarked on.



**Figure 7.1:** The current state of FNB Private Wealth Client-Servicing causal loop diagram (CLD) illustrating the envisaged impact of rebirth on the standards of client delivery and reputational capital, adapted from Senge (1990)

As can be seen in Figure 7.1 above, Selen (2000) proposes that resilient leadership is an important agent towards achieving spiritual intelligence through learning within rebirth which I propose as my solution. Co-creation and Contribution towards transformation is a people-based process which is essential for organisations to be effective. FNB Private Wealth Client-Servicing should adopt a more people-centric approach in the networked economy for collective knowledge harnessing. The leadership strategies within FNB Private Wealth Client-Servicing should function in real time, which in turn could accelerate response to new challenges. The way in which this BU and its leadership respond to hyper-competition is inextricably tied to the values regarding resilient people management and vision (Veldsman, 2002).

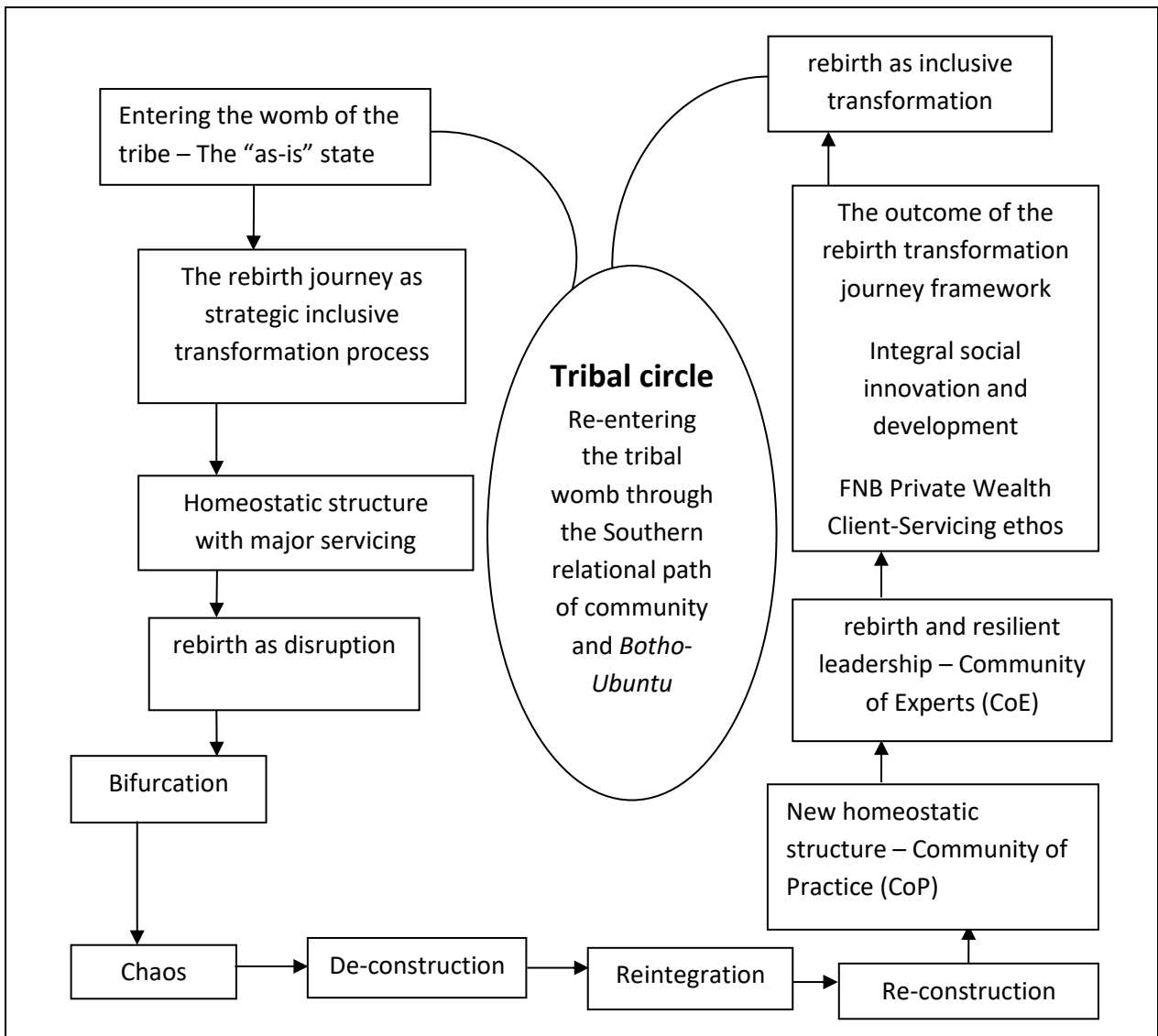
As depicted in Figure 7.1 above, the current state of FNB Private Wealth Client-Servicing and its culture needs collaborative leadership to translate actionable servanthip, integration of the importance of people in the larger organisational culture and drive the process of creativity. Through embarking on the rebirth transformation journey, integral leadership within this BU could advance the management of people as it is central to its business strategy to develop its full potential for collaborative learning to support existing core-competencies and achieving the greater FNB 2025 strategy. Integral leadership becomes essential for the formation of a resilient psychological culture, distribution of positive relationships through leader-member exchanges within the case organisation, and thereby ensuring a unified vision for achieving future goals of the organisation. The rebirth transformation journey introduces a collective co-evolving leadership framework and proposes that unified cultural co-creation should drive integral leadership as it mandates constant people development.

It is rather the quality of resilient leadership that determines whether the talents, potential and commitment of employees will be expressed as an efficient competency to secure creative ideation in the future. FNB Private Wealth Client-Servicing needs to develop and promote resilient leaders who realise that renewal and competitive readiness is dependent on the knowledge workers' readiness to grasp future challenges, continuous change, capability for lifelong learning and ever-increasing competition (Amabile, 1998). Leadership in FNB Private Wealth Client-Servicing should encapsulate the new rebirth imperative as they transform and re-ignite the essential people drivers for sustainable success.

To this end, leadership effectiveness refers to the input, processes and output that constitute productivity, which in turn are evaluated through the people management infrastructure and the propensity to achieve future goals (Veldsman, 2002). FNB Private Wealth Client-Servicing leadership needs to navigate the direction and shape the vision of the future to meet the challenges of the new financial knowledge society (Lessem & Schieffer, 2007). The leaders in this BU need to become resilient people leaders characterised by their ability to inspire trust and develop servanthip to facilitate effective team exchanges and by providing the architecture to support knowledge generation. Wilber (2000) defines servanthip as the coaching and facilitating of strategic people capital, communicating clearly to the entire organisation the importance of keeping a highly disaggregated organisation synchronised.

In Figure 7.2 below, I present the systems pathway for rebirth within FNB Private Wealth Client-Servicing which I propose to the BU as the rebirth transformation journey which I created during the mapping out of the rebirth transformation journey design (Senge, 1993). This depicts the influence of

the transition from the as-is state towards the desired state within this BU requiring a continuous re-entering into the rebirth tribal womb towards inclusive transformation. The following paths and steps are explained as beginnings, by entering the womb of the tribe which aims at facilitating grounding in identity through the Southern relational path of community and reason to promote the unity of organisational leadership, staff and community to harness the opportunity to discuss real challenges within the open frame of the tribal circle towards identity precipitating inclusive transformation through rebirth (Lessem & Schieffer, 2010).



**Figure 7.2:** Systems pathway for rebirth in FNB Private Wealth Client-Servicing as adapted from Senge (1993)

In Figure 7.2 above, the vision of a renewed homeostatic structure which introduces formal communities within architecture of rebirth is presented being the systems pathway as adapted from Senge (1993). This vision further translates into various communities and the outcome of rebirth as organisational transformation journey in producing integral social innovation and development towards a new servicing ethos aligned with the greater FNB 2025 vision. Deconstruction of known policies takes knowledge workers out of their comfort zones and aims at creating disintegration which may lead to reintegration and reconstruction of a new culture through a new OCD solution called rebirth. The individual knowledge worker is regarded as central in supporting the community to action learning, and this process is essential for attaining organisational objectives. Leaders realise the need for becoming more resilient and innovative thereby to encourage human capital collectively within FNB Private Wealth Client-Servicing.

Leadership need to consider a change in thinking patterns to reframe the management of people and learning experiences in the workplace. The rebirth transformation journey can be integrated by

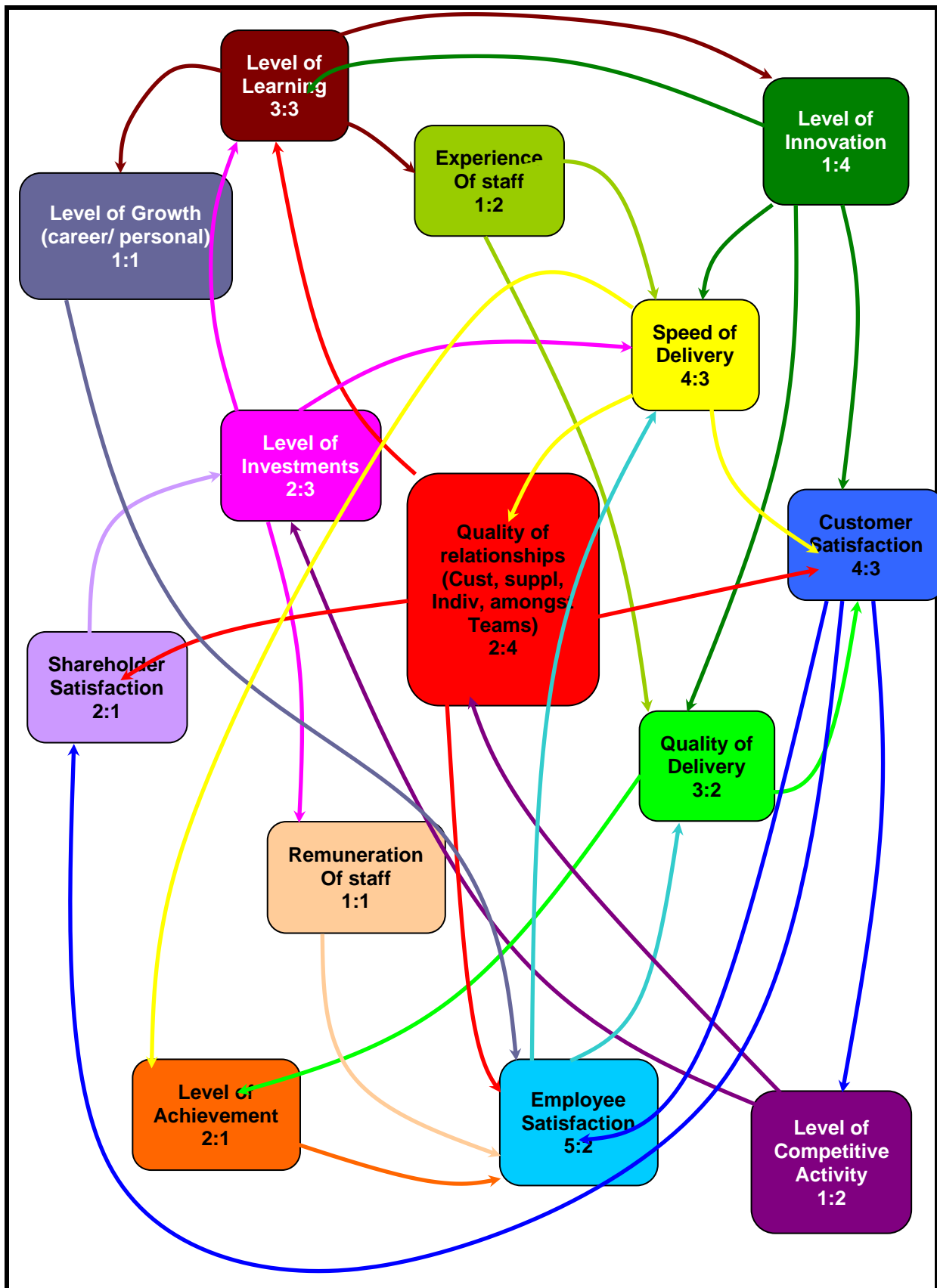
changing the fundamental way of thinking of leaders. Ephemeral changes to the daily thoughts about the ideal organisational culture in which people would like to live in could be inadequate for any deep social transformation as the thinking represented on this level leads more often towards quick solutions for half-understood problems. Real social transformation requires changing the categories of thought which should lead to altering the whole intellectual framework within organisations. This could change the collective mind-set, and lead to learning an entire new language, and re-evaluating the present condition regarding organisational learning and people management within FNB Private Wealth Client-Servicing (Lessem *et al.*, 2014).

The existing social and corporate perception of the management of people and attitudes regarding education is based on how leadership relate to phenomena in the natural world and reflect on perpetuating their immersion in mechanistic thought. The mechanistic categories of substance and identity, regarding space, time, movement, causality and relationship are mostly unaware of the extent to which these imperatives frame the realities of learning collectively.

The tribal circle also known as the womb of rebirth in this transformation journey is the homestead likened with my isiZulu and seTswana cultures where meetings, negotiations and weddings take place, and all other forms of gatherings occur (Nkomo, 2006). It is within this womb that the community deals with the individual self and simultaneously with collective voices of the larger community and world. This bears resonance with insights and lessons I received as presented in my story and the story of my culture. The celebration of people is therefore seen as the seed of a tree (Nkomo, 2006). When a new seed is planted, it can become the gateway for “being” of a collective mind shift with an acute awareness towards “becoming” thereby causing collaboratively and not in isolation. This communal causing could lead to a shift in thinking towards inclusive transformation (Zohar & Marshall, 2004) and Viljoen (2014).

#### **7.4 Desired end state for FNB Private Wealth Client-Servicing**

In Figure 7.3 below, all the variables needed to formalise the idealistic state are presented in a systems framework (causal loop) I created. These variables influence and add to the accumulation of knowledge which is deposited in the organisational memory through employees. The knowledge deposited into the variables in the causal loop is represented by the arrows flowing in and the outputs into other variables are presented by the arrows leaving the variables. These networks of relations that develop within strategic knowledge interactions improve the flow of information within the knowledge accumulation and rebirth function. This illustrates the various elements present in the system, and how they impact or are impacted by one another towards the desired end state for FNB Private Wealth Client-Servicing.



**Figure 7.3:** Detailed casual loop for projected end state for FNB Private Wealth Client-Servicing (adapted from Senge, 1990)

The causal loop in Figure 7.3 above demonstrates the various elements and variables required in the FNB Private Wealth Client-Servicing system, and how these variables impact on achieving a fractal-like organisation towards the 2025 vision. As a starting point the increases in the experience of internal consultants and knowledge workers will result in an increase in the speed of delivery and the quality of delivery, which in turn will result in increasing client satisfaction. Increasing client satisfaction will result in higher levels of job satisfaction of employees and stakeholders. Growing shareholder satisfaction results in greater investments, which result in investments channelled to higher levels of learning and increases in remuneration. This leads to staff satisfaction, speed of delivery and quality, boosting client satisfaction levels even higher. Increasing client satisfaction decreases the level of competitive activity from competitors, as less room is available to these competitors to make an impact on bank clients, hence improving the quality of relationships that exist within the new systems framework towards rebirth and the 2025 vision is crucial.

Creative leadership and the availability of people resources are essential for the process of idea generation to take place amidst the ability to accumulate knowledge which hinges on leadership facilitation as a centralised direction and by diffusing responsibility to the CoPs most directly concerned. Leadership exchanges are based on the individual exchanges between people to expand their shared cognitive environment, and are constructed within knowledge.

#### **7.4.1 The main drivers of the rebirth transformation journey**

From the causal loop projected ideal state presented in Figure 7.3 above I deduced main drivers which could make rebirth successful as transformation journey. The variables presented, each impact one another depicting the direct relationship. The main drivers of rebirth are the following:

- i. Quality of relationships between clients, suppliers, employees and CoPs – Increasing quality of relationships directly increases client satisfaction, employee satisfaction, shareholder satisfaction and level of learning.
- ii. Level of innovation – Increases in innovation increase the speed of delivery, the quality of delivery to clients and leave clients more satisfied in addressing their needs, with the benefit of increasing employees' learning further.
- iii. Experience of Client-Servicing consultants – Increasing experience leads to quicker, higher quality delivery with the result of consultants feeling that they achieve higher quality of service quicker, resulting in high staff satisfaction and hence re-enforcing that success breeds success.

Through identifying and presenting the main drivers of rebirth, I identified the effects these main drivers could have on the rebirth transformation journey. The main effects of the rebirth transformation journey are presented in Paragraph 7.4.2 hereunder.

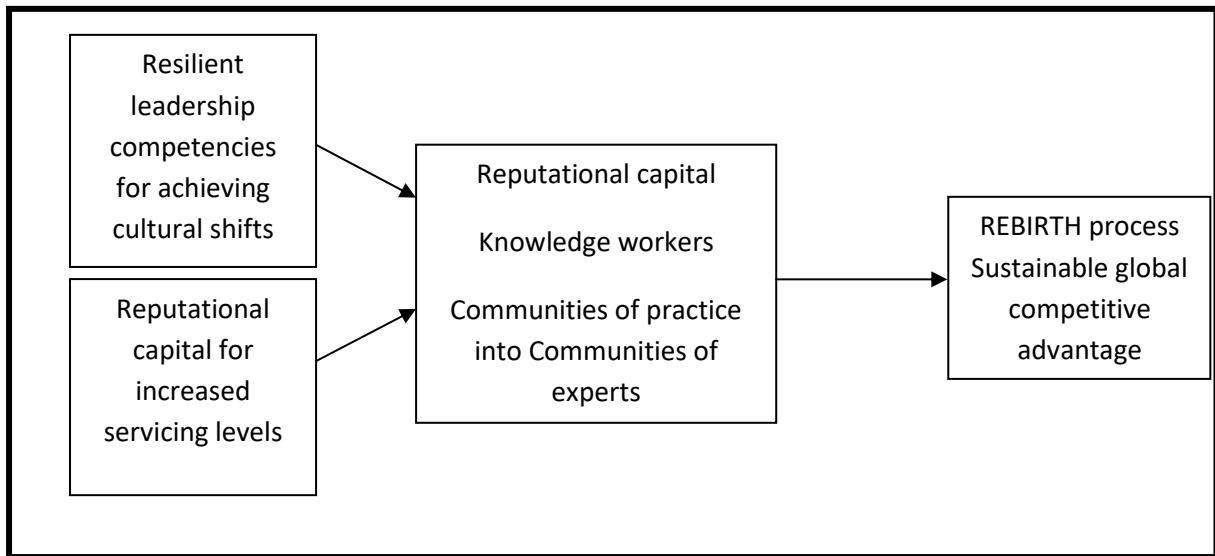
#### **7.4.2 Causal diagram outcomes**

Further from the rebirth main drivers presented in Paragraph 7.4.1 above, I also had to identify and present the main effects of rebirth to deliver enhanced service levels and increased reputational capital. These main effects are as follows:

- i. Speed of delivery – Achieving immediate client service delivery and increasing Service-Suite turnaround time.
- ii. Client satisfaction – More satisfied clients create a more motivated knowledge worker community which in turn delivers higher levels of service.

- iii. Employee satisfaction – As knowledge workers are highly cognitive and emotive beings, they are focussed on achieving the outcome in terms of the specific challenges. The higher the satisfaction and loyalty of knowledge workers, the more motivated they become in maintaining and achieving increased levels of reputational capital.

Resilient leadership through Rebirth combined with reputational capital produce knowledge workers who can advance from Communities of Practice (CoPs) to Communities of Experts (CoEs). Rebirth transformation journey can thus create a sustainable global competitive advantage through which organisations can transform as depicted in Figure 7.4 below.



**Figure 7.4:** Strategic framework for increased reputational capital (created by researcher)

In Figure 7.4 above, I propose a strategic framework to enable REBIRTH as a sustainable cultural innovation which can be applied in other organisations through resilient leadership competencies for achieving a cultural shift and increasing reputational capital for increased servicing levels. This framework ultimately illustrates that REBIRTH may be a sustainable global process to retain reputational capital by identifying and utilising knowledge workers, CoPs and CoEs in driving transformation. It is through this framework that REBIRTH can be applied in other organisations retaining the reputational capital and my contribution to the field of study.

### 7.5 Why rebirth as a transformational journey?

Humanity is at a turning point in history where the political, social and financial realities of this world will be confronted with the danger of extinction if a shift in consciousness does not manage relationships with our communities and the larger environment. Rebirth seeks to address the global economy towards finding integral transformational solutions, and questions our relationship with nature and the larger environment as our relationship to this earth is sacred and is the only place that we can call home. The essence of rebirth also questions the political, economic and social systems toward finding alternative methods of engaging and allowing all voices in our diverse communities to be heard (Toffler, 1980). As presented in the story of my culture, Africa is a land of diverse cultures that survived; and still advances together with ever-increasing stamina and creative ideas (Mbigi,

1995). To choose life could translate to building a life-sustaining society where people are regarded as the planet's greatest asset and collectively develop respect for all sentient and non-sentient beings. I propose rebirth as an organisational transformation journey which I designed to shift organisational culture and drive innovation through the 4C integral journey towards inclusive transformation as described in Chapter 1. I thereby facilitate rebirth as a new Southern value proposition within FNB Private Wealth Client-Servicing as my case organisation, community and PAR team. This transformation journey is the lens of rebirth through which I frame my contribution being the REBIRTH framework. This framework captures the Southern relational path of community and reason designed to cause inclusive transformation and harnesses the gift and latent power in engaging authentic identity and the gift of *Botho-Ubuntu* (Lessem & Schieffer, 2010). The REBIRTH framework is introduced hereunder.

## **7.6 Introducing the REBIRTH framework as Southern transformation and inclusive solution**

Driving Southern transformation and inclusive solution requires resilience. This means that CoPs may experience pain, acknowledge its purpose to unlock transformation, and tolerate it for a reasonable time for transformation to take shape. I designed the REBIRTH framework as an integral tool towards driving inclusive transformation to ground to Call in identity authentically while integrating all eight human aspects. This framework is applied within FNB Private Wealth Client-Servicing and takes the case organisation on its transformation journey following the IRA applied within this thesis as adapted from Lessem and Schieffer (2009). The rebirth transformation journey takes FNB Private Wealth Client-Servicing on its 4C integral journey through grounding, emerging, navigating and effecting (GENE) as follows (Lessem & Schieffer, 2009):

**South (Grounding):** Call; Origination is rebirth conception. The South is call where CoPs enter the womb in a quest to ground to authentic identity and being towards Call. The existential question of, “who am I?” and therefore, “who are we?” through the Southern philosophy of *Botho-Ubuntu* is interrogated. A process of open conversation and collective sense-making through story-telling is facilitated.

**East (Emergence):** Context; Foundation is rebirth awakening. In the East, the CoPs emerge authentically towards becoming. This encourages the CoPs to interrogate the existential question of, “why am I here?” and therefore “why are we here; what is the mandate for existence and how to reconstruct the purpose of this mandate through the lens of communal identity, Call and within a meaningful context?”

**North (Navigating):** Co-creation; Emancipation is rebirth exploration. Through rebirth exploration, the CoPs navigate the BU's burning platform and interrogate its challenges together to unlock creative thinking and solutions towards new innovations. This involves connecting to other BUs which may benefit from these innovations, affording everyone the opportunity to connect, Co-create new realities and fresh opportunity.

**West (Effecting):** Contribution; Transformation is rebirth uhuru. Effecting in the West takes FNB Private Wealth Client-Servicing towards the South by Contributing new innovations solving for burning

platform and challenges faced by the BU through sharing and implementation of ideas. This is where inclusive transformation occurs, and social innovation is birthed.

Figure 7.5 below is the REBIRTH framework, and captures the integral journey grounded in the Southern relational path and unlocking eight human aspects in locating towards authentic identity. This is the framework I use in deploying the rebirth transformation journey within FNB Private Wealth Client-Servicing which is my contribution as bringing a Southern perspective towards inclusive transformation.

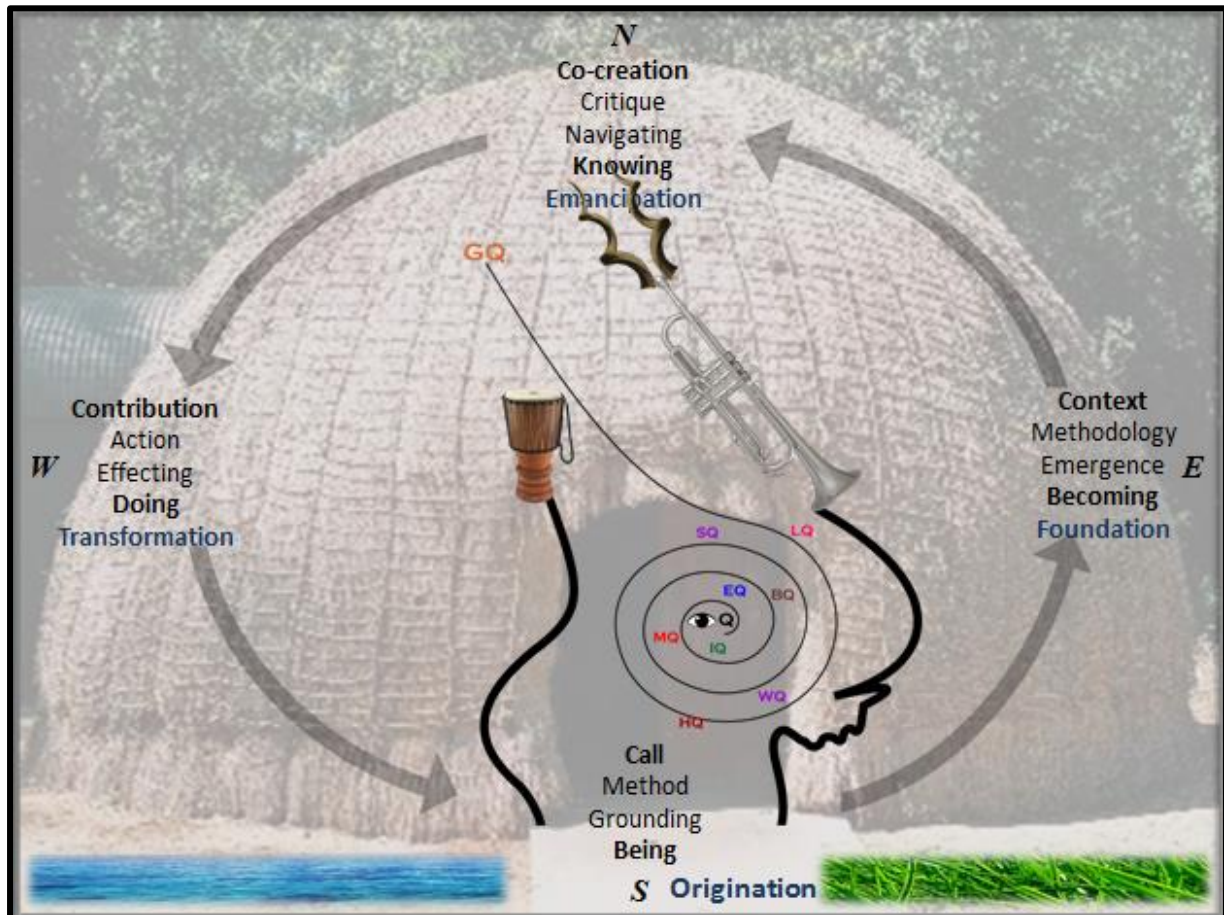


Figure 7.5: REBIRTH framework designed by researcher (2000)

The REBIRTH framework in Figure 7.5 above depicts the womb as fertile feminine system for incubation of functional constructs within the eight human aspects facilitating a rich dynamic of exponential growth, value creation and balance within and without the human ecology (Quinn, 2000) as presented in Paragraph 1.4.5. Aligned to the 4C integral journey, my proposed REBIRTH framework interrogates the issue of identity and harnesses eight human aspects to shape and inform this in an integral manner. The framework interrogates the conversation of human ecology and its impact towards inclusive transformation premised on internal quotients and seeks to suggest that inclusive transformation is birthed through engaging the human aspects authentically in identity as described in Chapter 1 beginning with the spiritual quotient (SQ) engaging the inner eye to see deeper and much larger into reality through accessing spiritual consciousness (Zohar & Marshall, 2000). Spiritual consciousness proposes that in every domain of organisational change and development, new rules for unifying community from the fragile to the anti-fragile and the reduction of fragility through deep

psychological work towards harnessing anti-fragility will be required (Markides, 2012) and Taleb (2012). This becomes the death to life experience in refraining identity within the safety net of the tribal circle (Laubscher, 2013).

As the womb progresses towards exploration as described in Chapter 1, the emotional quotient (EQ) spirals out enabling sensing, understanding and effective application of emotions (BarOn, 2005). Emotional maturity is a crucial characteristic of resilience, and Goleman (1995) describes an emotionally intelligent person as exhibiting self-awareness, self-management, social awareness and relationship management. The resilient leader can positively manage emotions in times of stress as emotional maturity means to have the capacity to tolerate pain, have insight into feelings, and can communicate effectively to others. For value to be enhanced within a community, the human being must connect to his or her intellect to provide a solution to a problem through the intelligence quotient (IQ). Similarly, letting go of the past and reinforcing good behaviour to enable a social life through the moral quotient (MQ) leads to experiencing chaos to thereby enable transformation to emerge and learn to change current homeostatic structures in the workplace. For transformation and rebirth to emerge successfully, however, the entire process of dissolving and reintegrating must be experienced regardless of the pain involved.

This framework further symbolises an impregnated Africa, presented in this thesis as the South, holding her impregnation and grounding to Call in identity through the South where indigenous African wisdom and knowledge may be accessed as relevant science to fuse with exogenous knowing to catalyse social innovation in transformational practices. This impregnation also embodies a health quotient (HQ) within the body quotient (BQ) by harnessing one's holistic health and well-being. The South grounds the individual first and interrogates the issue of identity. The integral journey emerges in the East where communal belonging and cultural norms are reframed to acknowledge informing new knowledge creation towards organisational transformation, navigating to the North to identify organisational burning issues and effect in the West to catalyse new solution as a co-existing community through the social quotient (sQ).

The REBIRTH framework as applied in the rebirth transformation journey points towards a renewed civilisation and world towards driving integral change and development and therefore brings the traditional African norms in creating integrated and a holistic approach towards organisational transformation. The rebirth transformation journey captures the identity and diversely rich culture of Africa, depicted herein as the South and seeks to acknowledge that when we begin to document Southern leadership models, we reconstruct our future reality and Co-create a future legacy which becomes new contribution to be passed on from generation to generation. This is the beginning towards reclaiming the Southern voice and authentic identity unlocking the Southern value proposition towards inclusive transformation (Lessem, 2001). The REBIRTH framework therefore seeks to reconnect and ground individual, community, organisation and society in identity through humanness which is much needed value in today's complex world.

Feminism is applied in the rebirth transformation journey, and brings about a new contribution towards transformational methodologies. The rebirth transformation journey is built on the essence of the human spirit and power of community to engage authentic human ecology beginning with the heart energy centre, integrating whole human being and becoming, "I Care (Heart); I Can (Head); I

Commit (Hands).” Feminism becomes transformational solution that would not traditionally find its way in Western theory without high work ethic as a life force and performance tool driven through the work quotient (WQ). In this thesis feminism is used to give the Southern community a voice and platform to rebirth a new reality and co-create a sustainable path towards inclusive transformation (Makangira, 2015).

## 7.7 Constructs used in rebirth

In Paragraph 1.2, I conceptualised rebirth and further differentiated between the three rebirths referred to in this thesis. Rebirth represents my personal rebirth transformation; whilst rebirth within FNB is referred to as the rebirth transformation journey and my contribution to the field of study is described as REBIRTH. In this thesis, rebirth is an organisational transformation journey within integral research, enterprise and economics (Lessem & Schieffer, 2014). The focus of this thesis, considers the four worlds – South, East, North and West to capture the overall multiple realities of this organisational transformation journey within FNB Private Wealth Client-Servicing designed to shift organisational culture and catalyse innovations through an organisation to embark on its 4C journey towards inclusive transformation (Lessem & Schieffer, 2010). I facilitate the rebirth transformation journey which I designed and facilitated together with my PAR team and implemented within the case organisation, FNB Private Wealth Client-Servicing.

The generic orientation toward renewal is specifically focused on the Southern relational path as presented by Lessem and Schieffer (2010). REBIRTH effects the necessary transformation required in an organisational environment to create balance and significant shift within the greater ecosystem (Collins, 2001). REBIRTH is a method which is also my unique value proposition built on Southern norms and values to foster transformation within the case organisation FNB. In Paragraph 1.4 I briefly introduced the six constructs used which enabled the rebirth transformation journey within the case organisation namely, *Botho-Ubuntu*, nature, dialogue, story-telling, symbols and the tribal circle presented hereunder.

Jung (1959: np) said: “The concept of rebirth necessarily implies the continuity of personality.” It is within this that rebirth as organisational transformation journey is framed within the context of Southern norms and principles; and integrates the first construct used in rebirth of *Botho-Ubuntu*; which Mbigi and Maree (1995) noted and described as “a philosophy of life, which in its most fundamental sense represents personhood, humanity, humaneness and morality.” As such *Botho-Ubuntu* is a metaphor that describes group solidarity. Group solidarity is central to the survival of communities with a scarcity of resources, where the fundamental belief is that “*motho ke motho ka batho ba bangwe...umuntu ngumuntu ngabantu*” which, literally translated, means a person can only be a person through others (Ramose, 1999) and (Mbigi & Maree, 1994). In other words, the individual’s whole existence is relative to that of the group. This existence is manifested in anti-individualistic conduct towards the survival of the group if the individual is to survive. It is basically a humanistic orientation towards fellow beings (Mbigi & Maree, 1994). Within rebirth, FNB Private Wealth Client-Servicing through engaging authentic identity uncovers the people frame of CoPs towards inclusive transformation becoming one purposeful community driven by a common objective.

The second construct within rebirth is that of nature. Nature is the most powerful and purest source of life, purpose and resources without which humans cannot exist (Robins, 2007). It serves as a rich library and teacher playing a critical role in the rebirth transformation journey. Most of the rebirth sessions took place out in the open where nature became the source of grounding to Call towards being and becoming. The impact of experiencing rebirth out in nature will be discussed further in this chapter. Dialogue is the third construct used in rebirth, and can be described as the process that underpins the principles of systems thinking (Mohrman, Finegold & Klein, 2002). Bohm (1998) describes dialoguing as a form of free association for a group for which there is no predefined purpose in mind other than mutual understanding and the exploration of human thought. In rebirth, I employed principles of PAR to empower CoPs to engage in dialogue towards identifying communal challenges and find common ground to effectively proffer new innovations from within rather than from without (Adodo, 2016).

Story-telling is the fourth construct used in rebirth which plays a significant role within the rebirth transformation journey. Stories carry behavioural norms and provide information on how to behave (Viljoen, 2008: 225). Story-telling creates awareness and understanding amongst communities. It is the one of the oldest and most invaluable forms of transferring information from one community to another in Africa which survived colonialism (Lessem & Nussbaum, 1996). Story-telling bears significance in engaging others as a leader, the ability to tell a story particularly by leadership in Africa is a gift for any organisation (Viljoen, 2008). Banhegyi and Banhegyi (2006) developed a model based on attribution theory and self-perception described the spirit of African leadership which states that for effective leadership to prosper, certain personality and leadership characteristics must be understood; such leadership skills could include creation of myths, meaning and reality through story-telling. Story-telling in rebirth will be discussed in Paragraph 7.11 where I present the rebirth transformation journey.

Symbols are the fifth construct used in rebirth which carries deep and significant meaning as described in the story of my culture and sometimes they may be in a form of a word spoken, event or an action (LeBaron, 2005). Symbols may take different forms; representing a person or object (Lessem & Nussbaum, 1996). Within the rebirth transformation journey in the case organisation, as symbols are used as organic and sensory learning tools within the tribal circle. I also identified song and dance as symbols and transformative tools for facilitating authentic community engagement and connectedness which their application in rebirth will be presented in Paragraph 7.11.

The tribal circle is a key symbol and is also the sixth and final construct used in rebirth symbolising a place of belonging and a sacred place where community gathers as one, and is also known as the womb of rebirth. The tribal circle is the womb from which social innovation and inclusive transformation may be birthed. Community as symbol symbolises collective individuals who share common interests and visions; the community in this thesis is FNB Private Wealth Client-Servicing.

### **7.8 The use and meaning of symbols in the rebirth transformation journey**

Symbols are organic, pictorial and visual, and integrate learning at a cellular level. Symbols create a systematic and ecological shift within the human ecosystem. Symbols are creative, but hold structure within a safe, creative bridge wherein left and right-brain thinking may converge (Laubscher, 2013).

Symbols are personal and ground to core. They are also interpersonal and connect to the greater whole (Nichols, 2010). Each symbol holds a unique and diverse meaning within the same and divergent environments, creating a narrative void of judgement (Viljoen, 2008).

Within the rebirth transformation journey, each symbol holds a significant, yet different meaning and is interpreted and understood through multiple dimensions. The narrative held within symbols is personal and interpersonal. Symbols hold a universal language understood and open to acceptance. Symbols integrate and bring aligned convergence throughout the rebirth journey and form part of the rebirth transformation journey's unique value proposition in driving action learning. Symbols ground, emerge, navigate and effect integrating the 4C integral journey (Bogdan & Biklen, 1992).

Within the tribal circle, four symbols were used to represent the four worlds. The first symbol from the voice of the South is the drum. In the African context, the drum brings communities together in any situation, symbolising the spirit of *Botho-Ubuntu*. The drum was used in rebirth to create unison and communal soul throughout rebirth. The second symbol is represented by the gong which is the voice of the East. Within rebirth the gong represented time and the criticalness of time in rebirth and innovation. The gong also represents the importance of individual authority, responsibility and accountability in the rebirth transformation journey. It is also a tool for calling upon the global village into engaging the rebirth conversation whilst restoring social harmony and restitution by listening to all voices. The third symbol is represented by the broom which is the voice of the north. In rebirth the broom represents cleansing, healing, communal movement and action in community through commitment. The broom also represents communal collaboration in innovation and cooperation towards communal calling. The fourth and final symbol is represented by the African calabash as the voice of the West. The calabash was first used in Africa to bring water to elders in the villages thus meaning that it represents bringing life into community. It represents resilience and fluidity of movement and newness of thought. Water can take many different forms, which resemble a powerful experience of rebirth towards individual and communal integral testimony, as it rejuvenates self and supports other in calling and purpose.

## **7.9 Rebirth objectives**

This research begins in the South as the origination of rebirth, towards experiential grounding evoking my Call and burning desire (Lessem & Schieffer, 2010). The aim of this thesis is to explore the strategic value and purpose of an organisational transformation journey, called rebirth within FNB Private Wealth Client-Servicing, and the greater FNB. The diverse burning issues within this case organisation will be integrated into the research approach, and applied through imaginative emergence and collective involvement (Kotter, 1990). Integrating these burning issues builds upon the rebirth transformation journey and formal engagement allowing for new forms in relational communal co-creation for the institutionalisation of rebirth and integral innovation and development. By institutionally navigating this organisational transformation journey through processes of co-creation as a community within scientific research, a relational process within society is represented by relational micro-enterprise and CoPs within FNB Private Wealth Client-Servicing. Furthermore, the rebirth transformation journey seeks to illustrate that communities can co-exist and co-create together (Nkomo 2006).

The alignment and transformation towards developing an agile, nimble organisation that consistently innovates is about to be birthed. The ability of the individual, team and, ultimately, organisation to respond swiftly and timeously to these changing realities will be the differentiating factor between competitive organisations in complex markets with declining profit margins (Senge, 2003). To enable FNB Private Wealth Client-Servicing to achieve the set targets towards its future mandate of being a social innovation hub within which superior client experience is harnessed and reputational capital retained, it needs a radical shift that will integrate its ethos of, “I Care (Heart), I Can (Head), I Commit (Hands)” grounded within the SQ. This integration would, through a clear strategy be driven through an organisational transformation journey which I call rebirth.

Within FNB Wealth, FNB Private Wealth Client-Servicing is the central discussion which I present to address the diverse science of change and people management within this BU. Furthermore, I interrogate current perceptions within FNB towards growing and positioning FNB Private Wealth Client-Servicing in becoming the preferred service provider for the rest of the organisation and its external clients. The rebirth transformation journey considers the current global landscape of exponential growth and change and realised the increasing risk of non-banks competing for market share in this industry. These competitors include organisations such as life-assurers, asset managers and technology firms and could be highly promotional to FNB Private Wealth Client-Servicing and the greater FNB’s future strategic intent. It is within this landscape that FNB Private Wealth Client-Servicing intends becoming a superior financial services provider with an integrated transactional, credit, investment and insurance client-led offering.

Theoretical knowledge is supported with experiential knowledge and knowing through PAR, an integral research methodology applied in this thesis. Rebirth interrogates primary assumptions within our consciousness and emergent ecosystems and thereby brings about a deep knowledge in unpacking the primary archetypal qualities stifling growth and innovation. Rebirth as an organisational transformation journey thrives towards being and becoming enabling organisational communities in embarking in an integral transformation journey towards social innovation. FNB Private Wealth Client-Servicing uses an understanding of unlocking fears and thinking beyond conditioning. The iceberg forms a classic means to show how only looking on the surface, as FNB Private Wealth Client-Servicing is conditioned to do, can easily lead to missing the tumultuous, deadly mass that lies submerged perilously below (Senge, 1993).

In line with my observation, FNB Private Wealth Client-Servicing appears to have often found itself being conditioned not to challenge the status quo resulting in stifled creative energy and unable to innovate. Likewise, FNB Private Wealth Client-Servicing accepts too easily that it cannot be creative in its work space; after all it was built for processing. In fact, the truth is that it is only its own conditioning that stops it from making innovation happen, too scared to take risks, too lazy to work harder, too conditioned not to challenge. The rebirth transformation journey therefore becomes the platform from within which FNB Private Wealth Client-Servicing begins to address these challenges in identity, investigates and interrogates its iceberg, learns to talk about fears and conditioning. This level of inquiry allows for better engagement and conversations both in terms of its people and in respect of its business goals and aspirations. With the rebirth transformation journey comes trust, and with trust comes speed and quality of ideation, design and implementation (Steyn et al., 2014).

### **7.10 Organisational culture**

Rebirth, as previously defined in this thesis is an organisational transformation journey designed to shift organisational culture and drive innovations which allow an organisation to embark on its 4C journey towards inclusive transformation. Culture provides direction by presenting guidelines and expectations for individual and team dynamics, and it defines the key value system of the socialisation process where all members are included into the corporate culture (Martins & Martins 2002). Wallace (2003: np) defines organisational culture as, “a pattern of ideas, a cognitive system, consisting of a relatively small set of abstract propositions, of both descriptive and normative kind, about the nature of human self and society, and about how people should feel and behave. This ‘culture’ is shared uniquely by the competent adult members of the community which forms behaviour of template.” Organisational culture is considered a critical contributing factor for the establishment of people forums where elders can meet to discuss integral people development.

Africa has its own customs, languages, culture, philosophies and beliefs for the achievement of a future vision that must precede the current status quo into action to guide organisations towards the ultimate expression of their innate cultural values. Organisational culture is dynamic, and, in this case, reflects FNB Private Wealth Client-Servicing’s capability towards future growth and interaction with the larger financial community (Viljoen, 2014). As an important contributing factor towards the establishment of a servicing knowledge forum, organisational culture may impact the degree direct to which creative and innovative behaviour is promoted among knowledge workers, leadership and cultural success. Lessem et al., (2014) support this statement in that they agree that quality and culture are inextricably intertwined within organisational culture to effectively promote creativity and innovation. However, Morgan (2000) is of the view that there also seems to be a paradox whether culture promotes creativity and innovation, or is it merely an obstacle to promoting innovative behaviour.

Organisational culture, thus a system of shared meanings, may guide the way in which organisations act and the way in which individuals view and interpret the corporate world (Novinger, 2001). The Conference Board of Canada (2006: 3) defined Employee Engagement as, "a heightened emotional connection that an employee feels for his or her organisation, that influences him or her to exert greater discretionary effort to his or her work." The rebirth transformation journey questions the crucial value of organisational culture and indicates that leadership can influence this culture towards the advancement of higher creativity within an organisation. The dimensions of creativity could be synthesised within a new strategic vision creating enhanced customer focus through interpersonal relationships that are more committed and resilient leadership.

Organisation cultural values and norms that influence creativity and innovation as shown by Martins and Martins (2000) are organisational knowledge, strategic future perspectives, and purposefulness and trust relationships. This encourages leaders to draw forward new innovations in the working environment to improve customer orientation and tolerance for mistakes and open communications that finally support all knowledge workers in FNB Private Wealth Client-Servicing. It is also important that openness and integrity create flexibility and autonomy which need to be promoted through the rebirth transformation journey (Martins and Martins, 2000).

The successful implementation of organisational change and development strategy will require a complete transformation of existing organisational culture as this is fundamental for the formation of additional information and communication flows and the success of the rebirth transformation journey in FNB Private Wealth Client-Servicing. Within rebirth I use African symbols, stories and archetypes as important cultural tools in the establishment of an inclusive culture characterised by definitive patterns and processes, which influence the attitude and behaviour of employees. The development of flexibility, adaptability and change resilience in individuals and organisations will remain a continuous challenge, as organisations strive to be emergent and fluid in their strategic behaviour (Kets de Vries, 2001).

At an inclusive communal transformation level, the proposed method for achieving the FNB 2025 vision would be to facilitate growth and integral innovation which occurs because of people committing to an environment that makes them feel cared for and values their potential, driving a culture of inclusivity (Viljoen, 2015). This level of inclusivity enables the unlocking of individual potential at a higher level through facilitating alignment between professionalism and creativity. This also enables the appreciation and value of operating within the FNB Private Wealth Client-Servicing environment knowing that it values human capital and supports the FNB 2025 vision.

At leadership and strategic level, the need to enable access to integral future value creation through rebirth could equip leadership with a practical tool to facilitate an environment that thrives on integral innovation and development driving a culture of communal creativity. At an individual and team level, rebirth could enable the knowledge worker to uncover and rediscover the latent potential within Servicing to utilise the tools needed for unlocking innovative value to achieve the 2025 vision collectively. Creativity and interpersonal value provide knowledge workers with aspiration that would not only energise and increase the level of quality displayed but could also advance the confidence and assurance to grow and be more motivated to achieve the collective 2025 vision. At a cultural level, achieving the 2025 vision would be to harness the latent value within the rebirth transformation journey as a strategic tool for enabling integral innovation and rebirth transformation systemically within an ecological environment (Lessem et al., 2014).

Once the collective, and individual has incubated the feminine in its human psyche, new awakening and rebirth are experienced becoming seed and catalyst for connecting the 4C integral journey propelled through enquiry and observation (Jung, 1968). The rebirth transformation journey is therefore, a way of being and becoming in community inculcating the essence of the human spirit, grounding and reigniting the SQ to integrate and align all other human aspects (Selman 2005). There is a need for an awakened consciousness from the South in today's corporate environment. The South reconnects to oneness through *Botho-Ubuntu* (Mbigi 2005) and communal voicing which pushes through conflicting agendas and subconscious schismatic realities through the power held in the communal SQ and its willingness to openly and authentically engage it. This grounding propels organisations to inculcate cultures which are inclusive catalysing sustainable innovation.

In the African perspective, personhood is characterised by: (i) The unity of the person with the environment (Khapagawani, 2006), (ii) the vital love/life energy that connects people intrinsically with others and nature (Mbiti, 1990), (iii) *Botho-Ubuntu* (Mbigi & Maree, 1994), (iv) unique space-time cognitive affection, behavioural consciousness and moral capacity (Viljoen, 2003), and (v) the desire

to collectively develop without high levels of competition (Nsamaneng, 1995) and Vilakati (2012). Having identified challenges within the FNB Private Wealth Client-Servicing case study, rebirth was used as an organic transformation tool to unlock new value propositions through creating sustainable and inclusive culture catalysing innovation. The FNB Private-Wealth Client-Servicing rebirth transformation journey therefore becomes the strategic tool brought into FNB Private Wealth Client-Servicing towards inclusive transformation (Viljoen, 2008).

### **7.11 Rebirth transformation journey**

The Southern relational path focuses on the release of individual, communal, organisational and societal genius oriented towards the global South (Hopkins, 2010). To that extent, the focus in this conversation is in the South. This is arguably the most neglected of the four world poles of reason in the North, realisation in the West, renewal in the East and relation in the South (Lessem & Schieffer, 2010) and Laubscher (2013). Rebirth becomes an organisational transformation journey that is grounded in the South wherein FNB Private Wealth Client-Servicing is the case organisation. As previously mentioned, the womb of rebirth being the tribal circle depicted in Figure 7.2 is the homestead within which the community gathers and engages one another. The communities come to realise that within the womb, FNB Private Wealth Client-Servicing deals with the individual self and simultaneously with the collective voices and of the community and the larger world.

It is now 2012, and FNB Private Wealth Client-Servicing plants a new seed together in engaging on its rebirth transformation journey which can become the gateway for coming into being of a collective mind shift with unbroken awareness towards action to thereby co-create collaboratively and not in isolation (Lessem et al., 2014), Wilber (2006) and (Zohar & Marshall, 2001). As the rebirth transformation journey begins in the South, it takes FNB Private Wealth Client-Servicing through a journey toward authentic self within the womb of rebirth as described below.

During this journey, various phases of rebirth were embarked on comprising of CoPs and CoEs from 2012 to 2014. Over this period, it became custom to facilitate workshops outside the work environment varying from two to three days per workshop. In preparation for these workshops, Shannon and I identified 15 individuals from team leaders to consultants who possessed strong attributes and characteristics to embark on this journey. This selection process was then vetted, and once the selection was done, an electronic communication was sent out to the identified individuals by a questionnaire to be completed whose purpose was to analyse individual understanding regarding aspects of rebirth and innovation. The results of the analysis were used to both understand each individual unique offering and group individuals into five CoP groups each consisting of five CoP members. For the purposes of this thesis I will only focus on rebirth that was conducted within June 2014. The FNB Private Wealth Client-Servicing CoPs re-engage with nature through the Southern rebirth transformation journey espoused through dance, industrial archetypes, song, colour, dialogue and story-telling as described below.

#### **7.11.1 Dance**

Vilakati (2012) said: "One writer suggests that emotions need not be removed, but you learn to dance with them – creatively managing them." God danced human beings into being. Dance in Africa is for every occasion, for mourning and celebrations in which everyone is expected to participate in moving with the rhythm. Dance becomes a tool strategically used within FNB Private Wealth Client-Servicing

towards the rebirth transformation journey to re-ground the community in identity and align towards the 4C integral journey.

Dance in rebirth becomes the community's observed tool for learning with each other as each dance bears deeper meaning within and purpose towards transformation. Dance unlocks creative energy and potential. Dance tells stories in form, dance inspires, dance rebirths (Viljoen, 2015). An African proverb says: "The man who beats the drum for the mad man to dance is himself a mad man," Adodo (2016). Dance in the African worldview is a conduit of self, other and communal healing (Monteiro & Wall, 2011).

Very closely aligned to song (music), dance is implicitly part of the African concept of song as movement of the body cannot be separated from their music, and indeed movement is music even without its aural component (Mereri, 1996); Pavlicevic (1997). African rituals involving dance incorporate the use of a sacred space, while utilising movement to activate healing energy (Monteiro & Wall, 2011). Hanna (1987), states that dance also represents a physical symbol for feeling and/or thoughts that can serve as a more effective medium than verbal language in revealing one's needs and desires (as cited by Monteiro & Wall, 2011).

Furthermore, Monteiro and Wall (2011) are of the view that given the importance of the body in diagnosing various symptoms and disease through traditional African healing methods, it would be essential for rituals to incorporate movements, not only to access conscious and unconscious processes, but also to offer a direct vehicle to address and transform their underlying causes. They also state that as a communicative behaviour, "a text in motion" or body language (Kuper, 1968), movements in dance become standardised and patterned symbols, and members of a society may understand that these symbols are intended to represent experiences and give meaning to an individual's external and psychic world.

Hanna (1987:3) as cited by Monteiro and Wall (2011) acknowledges that "to dance is human and humanity universally expresses itself in dance [through its ability to] interweave with other aspects of human life, such as communication and learning, belief systems, social relations and political dynamics, loving and fighting, urbanization and change." Hanna (1987) also continues to point out the significance of dance in the biological and evolutionary development of the human species. Dance, especially as used in rituals, has also played a role in the spiritual and social development of many communities throughout the world, particularly in African cultures. Through its many functions, dance is not only a form of healing, but also represents a symbol of the personal, communal and social narrative of these societies. Consequentially, the suppression of dance in many cultures, particularly in ritualised forms, has resulted in an imbalance in those spiritual, communal and interpersonal qualities that regulate the individual and unify societies (Hanna, 1987). Without these regulating structures, societies are apt to become increasingly vulnerable to environmental destabilisers. Dance therefore, is a crucial tool for mobilising communal engagement and creating aligned movement within an organisation.

Specifically, the nonverbal behaviour of dance is an integral component to the calculus of meaning for many rituals and the mechanism that provides the interface between the spirit realm, the individual and the group. Dance is a physical behaviour that embodies many curative properties that are released

through movement, rhythms, self-expression, communion and the mechanisms of cathartic release. These properties allow individuals to shift emotional states, often creating an experience of wholeness (Monteiro & Wall, 2011). The expression of emotion through dance is often stated to be organic, natural and immediate (Leseho & Maxwell, 2010).

#### **7.11.2 Industrial theatre and use of archetypes**

Industrial theatre becomes a form of expression in the rebirth transformation journey to explore and engage dark and light sides of human consciousness and functioning (Viljoen, 2016). The industrial theatre is presented through Myss (2003) archetypes. Myss (2003:np) defines archetypes as, “ancient patterns that exist in human consciousness which are neutral and manifest in both light and shadow attributes,” which expanded from Jung (1953:4-8) wherein an archetype is described as; “a kind of readiness to produce repeatedly the same or similar mythical idea,” further stating that, “archetypes are pre-existent form [s] true and genuine symbols that cannot be exhaustively interpreted, either as signs or as allegories as the origin of archetypes can only be explained by assuming them to be deposits of the constantly repeated experiences of humanity.” Campbell (1991) describes archetypes as “elementary ideas” which could be called “ground ideas” which appear in different costumes as a result of environment and historical conditions. In rebirth, archetypes are used to empower and equip FNB Private Wealth Client-Servicing CoP members to become aware of its dominant archetypes and own both the dark and light sides to rebirth a new communal identity. The key individual archetypes in rebirth are described in Appendix F.

#### **7.11.3 Song**

Within rebirth, song is used to cause the community to connect deeply with authentic self and identity. Song becomes a key source for driving meaningful communal conversation and collaboration towards achieving the FNB strategic intent and breaking emotional and social barriers inherent within the teams in FNB Private Wealth Client-Servicing. Song is a medium of voicing and causing within the larger community. It is an experience which engages the whole being and creates forward movement.

In music therapy, literature and popular culture alike, song (music) is often hailed as a universal language. Jones, Baker and Day (2004), state that the sound-centred nature of music provides unique channels for expression, exploration and experiencing self and others. The beauty-centeredness motivates an inherent search for meaning and wholeness that beauty brings to life and the creativity at the heart of music provides opportunities for problem solving that parallel those found in life generally (Bruscia, 1998).

Song provides a medium for communication between individuals, resolution of disputes between social groups and the upholding of tribal values (Jones et al., 2004). According to Aluede (2006), song (music) is considered a vital source of spiritual transformation, and vibrations are recognised as cosmic manifestations of a spiritual principle. The lamas (of Tibet) have developed a science and an art of sound. A song’s primary advantage is that it works with the personal (emotional) and transpersonal (spiritual) level.

#### **7.11.4 Colour**

Colour, is used in rebirth as a medium of integral sensing, sense-making and spiralling into spiritual mastery. The rebirth transformation journey used colour as a symbol of organisational transformation guided by Laubscher (2013) Human Niches and Spiral Dynamics. These human niches explain human

thinking systems in which they succeed because of thinking patterns. FNB Private Wealth Client-Servicing previously was dominated by the colours, Red (those that need to be noticed) and Blue (those that were willing to compromise for a better future). The paradox, however, was that the leadership within FNB Private Wealth Client-Servicing subconsciously wanted to transform their business unit into Purple (the relational and African way) of being through their new ethos “I Care (Heart), I Can (Head), I Commit (Hands).”

It is from these colours and its spiral dynamics that it became clear that Southern organisations predominantly followed Northern (rational) and Western (pragmatic) orientation with insignificance regarding the Southern (relational) and Eastern (spiritual) well-being (Lessem & Schieffer, 2009). Within the context of South Africa (SA) and breaking free from Apartheid, SA became known as a Rainbow Nation (Tutu,). Nelson Mandela refers to SA as a gift of diversity which remains a Southern value proposition for inclusive transformation, and, yet we see how the legacy of Apartheid remains entrenched in the culture of organisations.

Colour therefore becomes a medium for engaging the issue of diversity and identity within organisations towards inclusive transformation. The ability to engage constructs of colour becomes the FNB Private Client-Servicing journey to uncover this value proposition through rebirth. FNB has a human and servicing ethos built on its philosophy of, “how can we help you?” This relates directly to the communal philosophy of *Botho-Ubuntu* which connects to African purple where African norms could be integrated into the culture of FNB to drive its 2025 vision.

#### **7.11.5 Dialogue**

Dialogue is a conversation between two or more people used to exchange opinions on a subject matter or discussion. Voicing through dialogue is the process that underpins the principles of systems thinking (Mohrman, Finegold & Klein, 2002 cited in Viljoen, 2008). Engaging in a dialogue invites committed action. Bohm (1998) describes dialoguing as a form of free association for a group for which there is no predefined purpose in mind other than mutual understanding and the exploration of human thought. It allows for preconceptions, prejudices and patterns of thought to surface and become conscious.

According to Mohrman in Mohrman, Finegold and Klein (2002) cited in Viljoen (2008), dialogue refers to a conversation that connects multiple perspectives to enable the unit to “transcend deeply held individual and collective views and create new meaning that goes beyond any individual’s previous understanding.” Bohm (1998) defines the process of dialoguing as “aimed at the understanding of consciousness per se, as well as exploring the problematic nature of day-to-day relationships and communication.”

Dialogue that is holistic and effectively managed could promote ecological functioning and has the potential to intricately weave internal and external relationships, technology, innovation, people, and systems to create a climate in which integral innovation and spiritual intelligence can thrive (Quinn, 2000). Viljoen (2008), states that dialoguing may assist in translating the tacit knowledge in organisations, and may lead to inclusion. Dialoguing may be used particularly during a change or transformation effort to create shared understanding and buy-in in terms of the new directions to be followed (Viljoen, 2015).

Dialogue enabled meaningful conversations to take place within the rebirth transformation journey. This translated into listening to one another purposefully to gain collective understanding of what was being said at any given time. Furthermore, trust and collaborative relationships were also established connecting to the spirit of oneness. The rebirth CoP became the voice for the FNB Private Wealth Client-Servicing community thereby initiating dialogue on challenges and new innovations which the case organisation might be faced with. Within the rebirth transformation journey, dialogue is systematically used to build resilience. Resilient leadership is the ability to maintain optimal functioning despite stress, disruptions, shock and disturbance. This reflects the ability and thought leadership of individuals to self-organise and build more capacity for fusing collective innovations.

#### **7.11.6 Story-telling**

Story-telling (as cited from Tuwe, 2016) is a method of recording and expressing feelings, attitudes and responses of one's lived experiences and environment (Gbadegesin, 1984). The function of story-telling has been identified as mediating and transmitting of knowledge and information across generations, conveying information to the younger generations about the culture, worldviews, morals and expectations, norms and values (Ngugi wa Thiong'o 1982, Asante 1987, Kouyate 1989, Alidou 2002, Chinyowa 2004). Story-telling engages the whole being, whole sensing and creates positive energy to move a community forward. It is a way of recalling history and creates a platform for sense-making, reconnecting humans to the inherent gift and value of indigenous, traditional knowledge. It therefore transcends constructed human barriers as a process of engaging life ecologically.

Collective Story-telling enables organisations, individuals and communities to interrogate their thinking and the quality thereof to cause collective learning (Senge, 1990). The ability of rebirth to promote dialectic approaches to innovate, and not only to strengthen, but also to sharpen the eight human aspects and collective quotients of FNB Private Wealth Client-Servicing's ecology and establish formal external relationship synergies can become a differentiator that sets FNB Private Wealth Client-Servicing apart from its competitors. Story-telling within the rebirth transformation journey is used as a practical learning tool using repetition.

Participating in story-telling is an essential part of traditional African communal life, and basic training in a culture's oral arts and skills is an essential part of children's traditional indigenous education on their way to initiation into full humanness (Tuwe, 2016). Tuwe further states; using illustrations from the Zimbabwean Shona trickster stories Chinyowa (2001) argues that African story-telling is a powerful pedagogical tool for communicating the people's knowledge and wisdom. Far from being a mere source of entertainment, the story helps to sharpen the people's creativity and imagination, to shape their behaviour, to train their intellect and to regulate their emotions.

Three-Day rebirth workshops were proposed and agreed upon with the FNB Private Wealth Client-Servicing leadership to instil and drive a culture of innovation through my proposed solution being rebirth. Together with Shannon, a schedule for these workshops was drafted by using Microsoft excel detailing CoPs, rebirth workshop dates, tasks, start and end dates and status on the task(s). E-mails were then drafted and communicated through to the CoPs advising them how to get to the venue, what to wear and what they had to prepare for Day 1 depicted in Appendix G.

As the dawn of June 18<sup>th</sup>, 2014 breaks, rebirth takes charge and invites CoPs to embark on this transformation journey out in nature at the Houghton Boardroom Conference Venue in Johannesburg which was transformed into the tribal circle as depicted in depicted in Figure 7.6 below.



**Figure 7.6** Houghton Boardroom, Johannesburg (venue search, 2014)

Figure 7.6 above is the venue wherein rebirth workshops took place. This is the beginning of a new journey, new learning and innovation towards rebirth. This is where each of the CoP members will be rebirthed into being and becoming towards social innovation and inclusive transformation. Below is the breakdown of each day's happenings in terms of the rebirth transformation journey which takes FNB Private Wealth Client-Servicing into its authentic self, other, community and the larger world beginning in the South.

#### **7.11.7 Rebirth (rebirth) CoP workshop Day 1**

Day 1 focusses on setting the scene, contextualising and creating understanding of rebirth as transformational journey and OCD solution for transforming self, other, community and society in an inclusive manner. The first half of the day sets the theoretical frame of the rebirth transformation journey grounded in the Southern relational path of community and reason. The purpose of Day 1 is to ground to the South in authentic identity towards Call. This is achieved through engaging the rebirth community (CoP) in an experience of embarking on a 4C integral journey wherein they ground to Call towards being in the South, emerge in the East in Context and becoming, navigate to the North and Co-create communal burning issues in knowing and effects in the West with Contribution and doing.

Within this context I am the rebirth matriarch whose womb conceives and carries the rebirth transformation journey. My role is to nurture the community through transferring wisdom of African indigenous knowing and doing. I hold, carry and facilitate rebirth whilst being responsible for causing a rebirth within the individual, and the community. I thereby engage various tools to facilitate inclusive rebirth within FNB Private Wealth Client-Servicing.

The CoP is taken out into nature where it is invited to learn and experience what the rebirth tribal circle is, and how it is set to be entered from the South which is the path of reason and community. This tribal circle is made up of rebirth symbols being, an African drum, a gong, a besom, calabash, fire logs, blankets, an African stick, African pot and a small fire. Symbols in the tribal circle are explained and their significance and metaphoric meaning and meta-insights are shared as discussed in Paragraph 7.7. The purpose of the tribal circle and the new creative and learning space being out in nature, sitting on fire logs in a communal circle are also explained. The womb of rebirth as depicted in Figure 3.1 is characterised by a circle with an entry point in the South, set in nature surrounded by the rich heritage and wisdom of Africa latent in symbols, colours, songs and diverse people. Symbols are representative of what is offered as instrumentation and tools inside the womb (Vilakati, 2012). There is caring, connectedness, collaboration, credibility and commitment.

The womb is a systematic technological and processing system which functions strategically integrating multiple elements within the human system and ecology. The womb is maternal and works strategically, systematically and collaboratively to unlock latent potential value in diversity and draws from the Southern rebirth transformation journey and inner wisdom (SQ) to align and harness all eight human aspects (Wheatley, 2002). The womb of rebirth is a warm sheltering from which life may spring forth and thrive. Jung (1968) viewed a child's desire for his mother as a necessary requirement to return to the womb to experience rebirth and to alleviate any past experiences in the womb and begin a new spiritual journey. The womb in rebirth enables the community to grow together and with each other through collaborative and communal power that informs and shapes collective consciousness (Jung, 322) and Durkheim (1893). It is the womb of truth that advances knowledge in pushing through the community's conflicting realities. A spirit in cultural awareness allows members to respond authentically, and it allows for differences in views to be expressed for collective learning (Wheatley, 2002).

The CoP is invited into the tribal circle and an African ritual of welcoming others into your home with a meal is initiated. This experience takes place in the tribal circle. Later, the CoP moves back towards the tribal circle where a different ritual inviting each CoP member to re-enter the tribal circle is conducted using different symbols as learning tools. The symbols become learning and transformative tools which I use to facilitate moving all community members from their current limitations towards their future potential while interrogating questions of identity and existence. Within the tribal circle, the community grounds to Call in the South through engaging questions of existence and purpose to Co-create aligned understanding of communal burning issues to bring a Contribution to catalyse social innovation. In sharing the communal stories and going deeper and deeper as the stories evolve; identity, purpose, leadership, team efficiencies, collaboration, innovation, trust, culture and communication are highlighted as integral constructs towards inclusive transformation.

In rebirth the gong which is a symbol of time is struck three times to signal value of time and the importance of individual choice in entering the rebirth transformation journey by intent which becomes a challenge to the community to take ownership and remain accountable moving forward. When the gong is struck, the CoPs become alert and purposefully approach the tribal circle with each of them reciting the rebirth mantra, "I ask for new ears to hear, and for new eyes to see the different visions as I am the authentic creator and I experience and co-create my unique autopeosis. After each CoP member, has re-entered the tribal circle with the African stick in my hand I ask, the question of identity, "who am I?" I ask this to probe authentic-ness of self, I tell my story authentically to the community, and pass on the stick another CoP member asking them to tell the rest of the CoPs who they are. This process carries on until all fifteen CoP members have shared who they are. This was not an easy task as some could not identify with their true self and unable to articulate clearly what it is they stand for or represent in their individual life journey. This step of self-enquiry towards being and engaging questions of identity highlighted a level of discomfort within the CoPs to speak authentically and release masks.

To address this discomfort, I challenged the CoPs to become one by creating a dance, a dance that could display synergy, passion, commitment and creativity in 10 minutes. I did this in hope for an original, synchronised and creative dance which could symbolise the diverse and inclusive collaboration of fifteen unique individuals who have become a part of one community with FNB Private Wealth Client-Servicing. However, this proved to be the opposite of what I had hoped for. It took fifteen minutes for the dance to be complete. The dance which they choreographed was a popular dance which is commonly danced at weddings and parties to contemporary wedding or celebratory songs, this dance is commonly known as "codessa" to some South African "blacks, coloureds and Indians." Because the CoPs also included some "whites" it took longer for them to grasp the rhythm and steps contained in this dance. When this dance was performed, it was a chaotic mess as there was no co-ordination and I reckon it was because it was not original. It did not represent the entire CoP but the few that were familiar with it. With that said there was a lack of synchronisation and commitment as it appeared (from body language) that some couldn't wait for this performance to end.

Together with Dr Steyn and another external observer I intervened, and asked whether they were all enjoying taking part in the dance to which most of the CoPs responded by saying "no." I was then prompted to engage the CoPs in a conversation about dance and its meaning, what it evoked and what it stood for whilst making examples of ballroom dancing, cultural dances, street beat-boxing and music videos. This lit the CoPs as I urged them to attempt another dance in 20 minutes which then took them fifteen minutes and was a masterpiece of their own creation. The dance was a combination of the "codessa" and some dance moves where they leaned and held on one another whilst singing a popular song titled, "lean on me" coupled with rhythmic clapping to the tune of the song. This dance and the song complemented each other very well, to the extent that I could see, feel and be drawn in this spectacular performance as there was zeal from the entire CoP. It is for this reason that dance and song became a powerful tool for rebirth.

Throughout the rebirth transformation journey song and dance become powerful media for the community to engage its reason and mandate for existence within FNB Private Wealth Client-Servicing thereby using a creative medium to unlock strategic understanding. While the exercise engaging song and dance as strategic, transformational medium proves very challenging for all CoPs at individual,

communal and organisational level, it tests the CoP's abilities in engaging the eight human aspects (8Qs) holistically. This becomes the litmus test for CoP understanding of strategy and co-creating a common vision and value proposition towards creating new contribution. This exercise illustrates succinct and emergent layers of human and organisational diversity which can impact achieving inclusive transformation.

The afternoon of Day 1 delved deeper into 4C integral journey which was navigating into the North to co-create an aligned understanding of communal burning issues, the organisational strategy and mandate for FNB Private Wealth Client-Servicing's existence and how it interfaced with technology, innovation, people and systems towards the FNB 2025 vision. The CoP is encouraged to use this process to identify burning issues and the importance of aligning to strategy to move forward. CoP members are grouped into their respective Community of Practice (CoP 1, CoP 2 and CoP 3). From these CoPs, five innovation roles for each CoP member in their respective CoPs are then displayed with their communal role with all the five roles being: reconnoitre, shepherd, gatekeeper, handyman and navigator adapted from Steyn (2011). The innovation process is then introduced, myths of innovations shared, and each member is challenged to bring five innovating ideas which they believe will drive delivery on the FNB Private Wealth Client-Servicing organisational strategy. The CoPs are advised that they will be presenting these innovations to the CoP.

A brief theory on archetypes is shared, and CoP members are challenged to think which archetypes they need to dispel and which archetypes to embrace towards FNB's 2025 vision driving innovation. The CoPs are challenged to come dressed as the archetype they each need to dispel and the archetype they each embrace for the following morning and to bring innovative skits to present to their fellow CoP members. This beckons for deep questioning within self to go home and get to know their individual archetypes.

Day 1 ends with individual reflections of the day's learning, the tribal circle, and rebirth as a transformation journey in theory and practically; constructs and symbols, communal reflections and commitments on way forward regarding delivery on strategy. A mixture of extreme positivity and enlightenment fills the environment heightening expectancy of Day 2's process while a sense of apprehension and uncertainty still lingers for others as Day 1 ends.

#### **7.11.8 Rebirth (rebirth) CoP workshop Day 2**

Day 2 aims at presenting greater opportunity to press deeper into issues of existence located in identity through self; community, organisation and society as well as exploring how potential is unlocked through interrogating subconscious conditioning to catalyse innovation. As instructed on Day 1, CoPs are dressed in their archetypes and welcomed into the tribal circle. Hereafter, the CoPs are redirected to a boardroom where they will be presenting their archetypes. CoPs are asked to present their archetypes in theatrical form illustrating the archetypes which the individual and later, the collective CoP archetype which they need to dispel moving forward and illustrating which archetypes to embrace. Through the presentations on archetypes, CoPs appear to be more relaxed and willing to carry on this journey right through till the end. Impressed with this breath-taking shift in moods and spirit; I am prompted to acknowledge each CoP's commitment in this journey and most importantly the collective positive energy towards social innovation and inclusive transformation. As

Day 2 progresses, I apply varying OCD and innovation techniques throughout the day to keep the community suspended in a space that keeps them imaginative and open to more ideation.

After the archetype presentations, CoPs are given stacks of sticky notes for the innovation presentations. CoPs are given the opportunity to present their five innovations detailing each innovation's value proposition to the business. They are then requested to list their innovations on the flip chart provided. After all five innovations have been presented, the rest of the CoPs are given the opportunity to ask questions, share ideas and are requested to place sticky notes next to the innovations to which they could add value with guiding questions or comments. Through this exercise alone, seventy-five innovations were created by fifteen individuals in a very short space of time. This illustrates that innovative solutions thrive and emerge within a conducive environment. Because there were seventy-five innovations, it was clear that there were not seventy-five problems that needed to be solved for. Most of the "problems or issues" identified were similar. However, there was more than one solution through this innovation process illustrating that there is not always one way to solve a problem(s) but multiple solutions if problem solving is approached positively. This energised and encouraged on CoPs this achievement and wanted to work harder to see their innovations implemented.

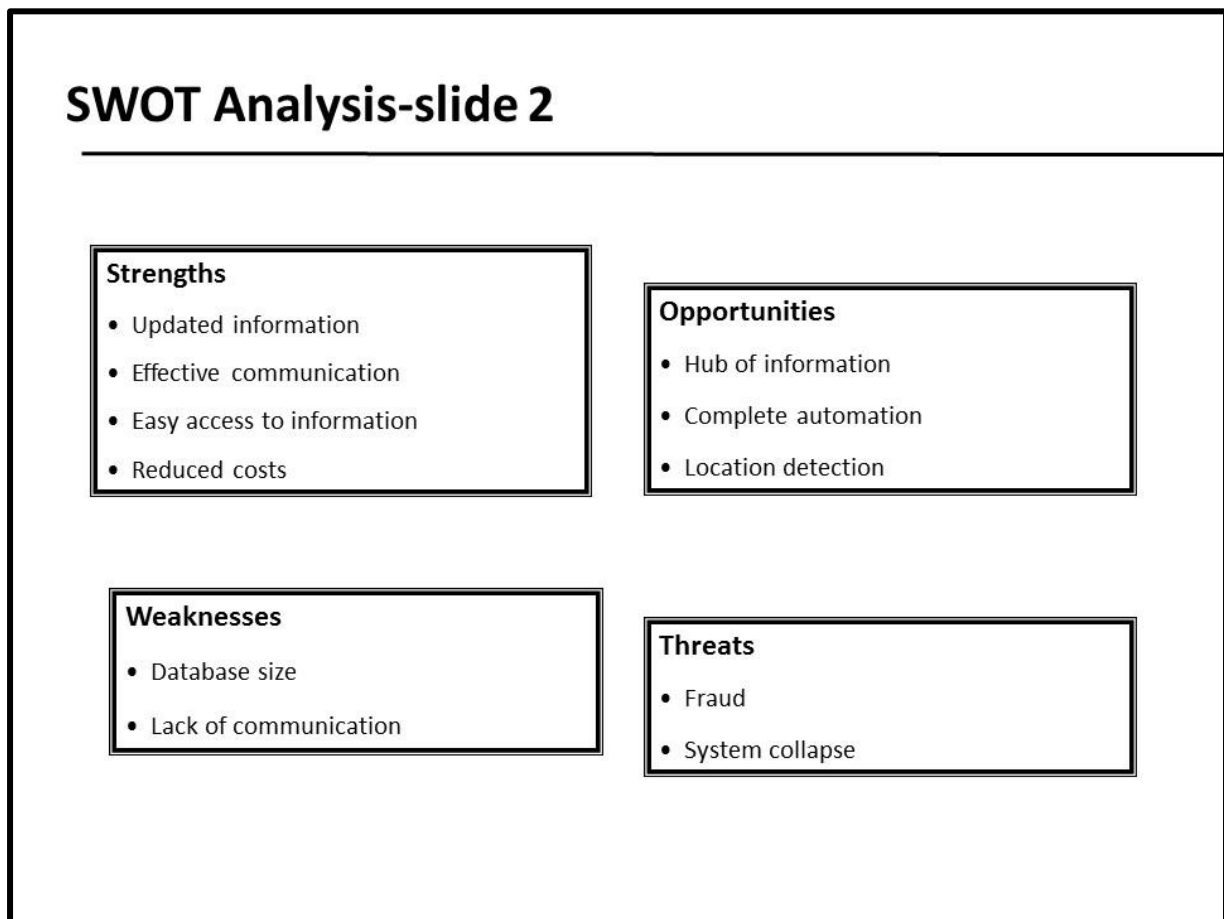
CoPs were then asked to begin working through the innovation funnelling process to identify opportunities for innovation to create a culture of innovation within FNB Private Wealth Client-servicing (Steyn, 2011). Funnelling of all innovations allows for practical views, planning and deployment at a later stage. This process follows Samuel's (2009) D4 Blueprint for Breakthrough method of Define, Discover, Develop and Demonstrate. However, Day 2 focuses mostly on the first two D's of D4 Blueprint for Breakthrough method being Define and Discover which CoPs will need to present on as the day progresses. Define deals with the creation of innovation opportunity, scoping of the innovation opportunity and the management of people and projects. Through Define, each CoP is expected to collectively pick five of the twenty-five innovations they collectively came up with, thereafter scope these innovations and consider how these innovations will be implemented and who will be responsible for which task. This comes naturally as the CoPs are now familiar with each other's innovation roles, thought process and most of all, the people or process which each innovation aims to solve for.

Discover deals with the refinement of the innovation opportunity, leverages brainpower, searches knowledge basis and prioritises and selects ideas. The CoPs are then expected to refine their five chosen innovation opportunities whilst leveraging on each other's brain and creative power. Through this a knowledge basis is created from which the CoPs can draw ideas and prioritise these ideas based on time and cost it will take for the innovation to be implemented. As much as these deliverables may appear to be easy, it must be noted that working in a team does have its own challenges and as such during this time; CoPs faced their own challenges some of which were non-commitment by CoP members, insufficient communication and some lacking some motivation.

Later, in the day the third D being Develop is explored which deals with formulation, selection and optimisation of the innovation design. As much as rebirth as an organisational transformation journey is qualitative; organisations in the finance sector such as FNB rely on quantitative data more than qualitative data. In order for rebirth to be well received, it becomes important for both quantitative and qualitative data to be presented. This becomes part of the elements with which Develop deals.

The qualitative data for CoPs must include current processes in place if any and new processes after implementation of the innovation as new value proposition in their presentations. Qualitative research is after all concerned with the quality of the value proposition. This enables for discussions or concerns that key role players might identify as implementation issues creating an internal reliability relationship. Through the qualitative data, CoPs will be able to identify customer acceptance with their value propositions and thereby include this data in their presentations.

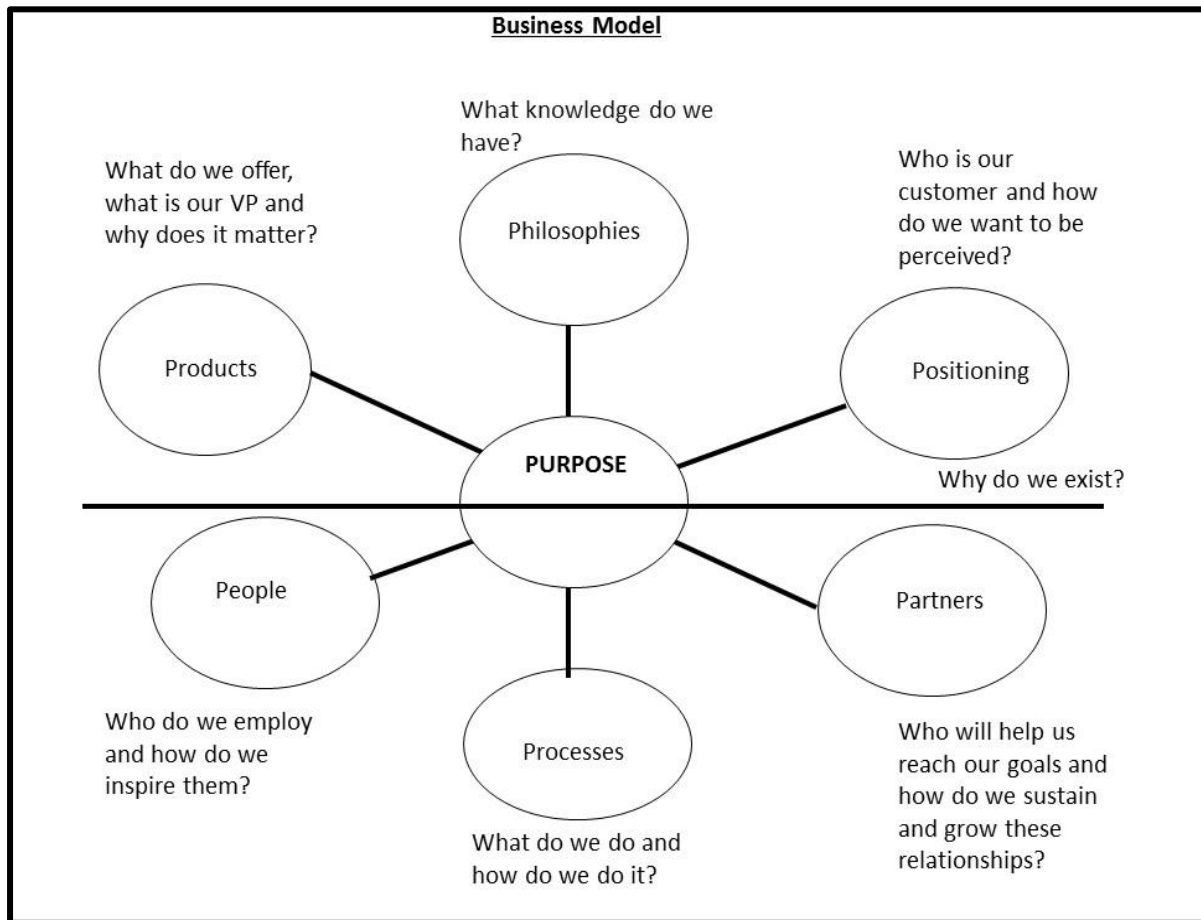
After analysing and presenting the qualitative and quantitative research data, the CoPs present each innovation's strengths, weaknesses, opportunities and threats (SWOT) as coined by Humphrey (1960-1970). A SWOT analysis aims at identifying the strengths and weaknesses of an organisation and the opportunities and threats in the environment (Dyson, 2002). These may include possible risks or threats involved in implementing innovations such as lack of commitment, emotional and responsibility risks while technology and partnership with product providers may be strengths. The lack of creative innovation may be a weakness whilst new customer relationships may be new opportunities for FNB Private Wealth Client-Servicing. The SWOT analysis slide presented by one the CoPs is depicted in Figure 7.7 below.



**Figure 7.7:** Example of a SWOT analysis slide presented in rebirth

As depicted in Figure 7.7 above, the SWOT analysis indicates to stakeholders that these innovations have been well thought through highlighting the pros and cons therein. The SWOT analysis presentations empower the CoPs to present the business model for their innovations which is based on the 6Ps of the purpose of the value propositions being: philosophies, positioning, partners,

processes, people and products. The 6Ps enable CoPs to understand the value and purpose of each innovation. Figure 7.8 below depicts the business model per the 6Ps as adapted from Oates (2006) detailing the purpose of people, processes, partners, positioning, philosophies and products.



**Figure 7.8:** 6Ps innovation business model used within rebirth transformation journey adapted from Oates (2006)

In Figure 7.8 above the business model depicting the 6Ps innovation business model wherein philosophies, positioning, partners, processes, people and products within the case organisation are presented (Oates, 2006). The 6Ps are used as innovations business model that enable FNB Private Wealth Client-Servicing to uncover its purpose as an organisation and within the context of its partners and community. This purpose also poses the question of existence at an individual, communal, organizational and societal level propelling this BU to re-engage issues of identity. The 6Ps business model leads the CoPs to define and identify critical functions core to this BU. These critical functions are presented as sensing, sourcing, serving, symbiosis and synthesis which connect the eight human aspects within the integral path towards inclusive transformation (Manning, 2002).

Towards the end of Day 2, the community shifts and clearly articulates the archetypes they wish to own and dispel fully, grounding in identity and living their collective purpose and BU philosophy of I Care, I Can, I Commit. Serving as a critical function enables the CoPs to seek and present knowledge solutions in enhancing their innovations whereas symbiosis seeks to identify the relationship between FNB Private Wealth Client-Servicing, the government, clientele, society and its people for increased reputational capital. Synthesis in rebirth is concerned with the commitment to uplift and elevate

creative and innovative thinking. Sensing presents thought partners, innovators and humanitarians identified through the innovation process which becomes a critical function as the CoPs present current problems, considering future inclinations and global influences in the knowledge economy within which they exist. This process thereby becomes a catalyst for embedding a culture of inclusive transformation. Presentations are then carried out during the rebirth workshops and back into the workplace, where the success remains to be seen as levels of commitment to pull through and implement these promptly as a community is being tested. The proposed innovations are aligned to business values and vision, making it easier for them to be implemented.

In Day 2 CoPs were encouraged to think of sustainable innovations for this BU giving them the opportunity to unlock their full potential. Furthermore, this beckoned for CoPs to capitalise on each member's individual strengths, innovation role and leadership behavioural role whilst establishing the collective strengths of each CoP. It must, however, be noted that innovating can be overwhelming for many professionals because many of the "standards" people put in place limit creative ability and competitiveness. It is now the end of Day 2 and the entire CoP appears energised and expectant of what lies ahead anticipating an opportunity to break new boundaries in Day 3. Gethan, an elder of the community describes Day 2 as, "a ground-breaking experience this was; an opportunity to look forward to serve in the community and the greater FNB business." Day 3 puts great emphasis on ideation wherein CoPs are requested to come dressed in their respective archetypes.

#### **7.11.9 Rebirth (rebirth) CoP workshop Day 3**

On Day 3, the CoPs are dressed in their collective CoP archetypes creating a tangible energetic shift in mind and purpose. Once again, the day's events remain a mystery although preparation is at bay and the community in high spirits. The community is welcomed into the tribal circle; the gong is hit three times, as the community steps into the womb, everyone is gearing towards overcoming by becoming. This time entering the womb is a lot easier and more comfortable as the community engages its new awakened human aspects and internal quotients to navigate both the opportunities and challenges that lie ahead. In Day 3 of the rebirth workshop, both individual as well as communal adaptability to work with change is visible. The individual and communal vision is also tangibly clear. Before entering the womb, there is a log lying across the entry point symbolising barriers towards innovating or standing in the way of individual successes. The community individually jumps over this log and states individual commitment or intent towards breaking free.

Each CoP is now mentally and physically prepared to welcome any concern, criticism and the viability of each of their top value propositions ready for sign off after their strategic presentations, paving way for presenting to the greater FNB Wealth Executive Committee. This is an overwhelming experience as the CoPs tapped into core challenges of the BU for both internal and external clients, proving that the tribal circle is indeed that of co-creating as a community. Business plans are ready to be presented to the leadership of FNB Private Wealth Client-Servicing by the CoPs to ensure that these innovations are implemented and in line to win innovation awards for stellar work within the greater FNB. These presentations are aligned to the fourth D of the D4 Blueprint for breakthrough being Demonstrate. This requires that a working business model is built and processes mapped for the innovations. The last two elements of Demonstrate are intentionally left off the rebirth workshop being process optimisation and improve and transition as CoPs are expected to conduct these elements back in the workplace to ensure that these innovations are implemented bearing in mind the comments, critique and feedback from leadership. In Appendix H, a Microsoft power-point business plan presentation

from one of the CoPs is presented which illustrates the innovations they came up with and what challenges they would solve. Day 3 thus becomes a stepping stone and solid foundation towards being, becoming, knowing and doing and integrates the four worlds within each CoP member and realises their full potential journey and thereby envisions greater career aspirations.

The time has now come for closing of the circle, this embeds the community's realisation that everyone has a purpose, a journey to travel and that it cannot be done alone, highlighting the importance and value of community to harness the gift of diversity to cause inclusive transformation. An African proverb states that, "If you want to go fast, go alone, if you want to go far, go together." This becomes visibly highlighted as a Southern value proposition for re-engaging organisational culture through engaging the spirit and ethos of community and *Botho-Ubuntu*. In the tribal circle, focus is again on reflection. Everyone speaks authentically and purposefully. The overall feeling is that of extreme gratitude for being nominated to be a part of the rebirth transformation journey. An elder said: "I grew very much as a person, father, employee and leader. This is truly a blessing in my life and has altered the course of my life to a new journey, full of new challenges" (Morgan, 2014).

It is essential for FNB Private Wealth Client-Servicing to improve its environment for innovation to take place and to unlock the collective potential and facilitate dialogue and harness the innovative interplay between professionalism and creativity. In so doing, I engage maternal and feminine aspects of rebirth grounded in Southern norms to drive organisational transformation and tap into existing African leadership constructs within succinct dialectic approaches. I use these approaches to re-construct, amongst others, communication as a creative tool for driving inclusive transformation. FNB Private Wealth Client-Servicing by its nature is driven by communication and the ability to use and appreciate rebirth as an organisational transformation journey and strategic tool to unearth and thereby drive diverse experiences and narratives to unlock emerging transformational communication. The rebirth workshop environment pushes CoPs to think without constraints traditionally imposed by corporate usually being time, money and resources.

### **7.12 The dynamics of rebirth relationships**

The dynamic in rebirth is toward realising the FNB 2025 vision collectively and reveals the interdependence of the team, as it comes to realise joy, fear, the meaning and purpose which involves encounters which occur when the I (inner self) approaches the other as thou (the inner self of the other). The "I-Thou" is spoken when the whole self is engaged in the rebirth transformation journey and the wholeness and contributions of all CoPs. CoPs bring purpose and establish a living, mutual relationship that centres on the trust among knowledge workers. The very purpose of the CoPs is to enter with the whole self, contributing spirit in the movement and letting go of the past paradigm of control.

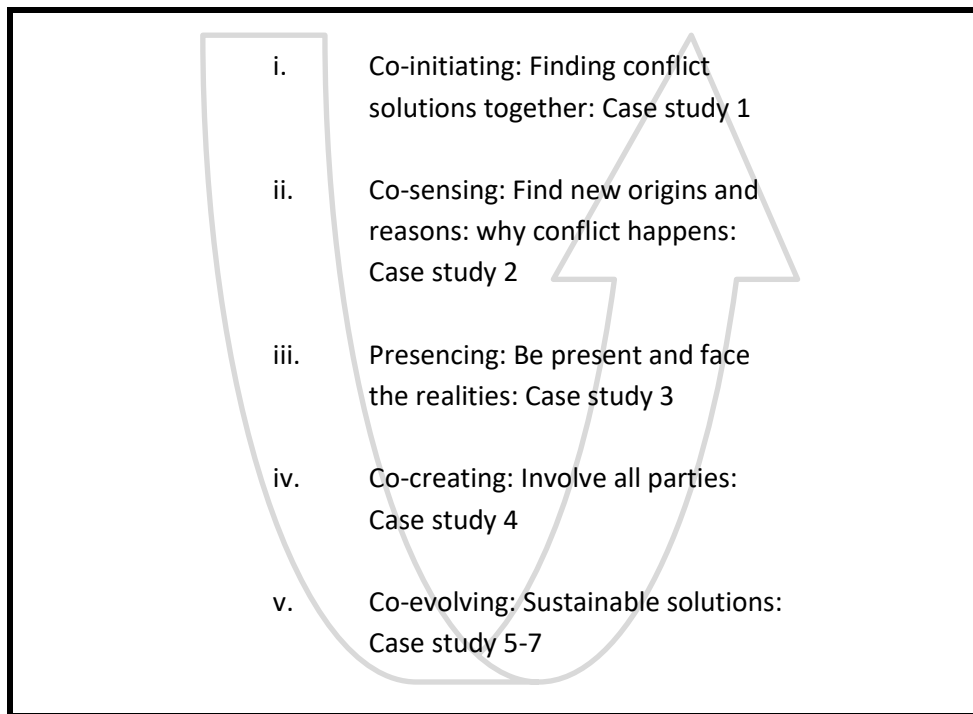
Entering the womb of the tribe mindfully and with attitudes of genuineness, on-going regard, and hospitality can lead toward embracing the other's personal realities and truths and coming to know the process through a vision that unites mind and heart. The aim of whole-sight knowing is not to control or exploit, but to come to understand with compassion. Whole-sight knowing occurs when listening to the personal stories of knowledge workers, for it is in the stories shared that collective stance toward and understanding of the world is established (Palmer, 1983).

### **7.13 Engaging the rebirth transformation journey**

Engaging the rebirth transformation journey may free one from historic memes and enable the opportunity to create a communal, diversified and inclusive meme. It also permeates the dominant colours of red and blue which are no longer relevant in today's knowledge economy which, true to its change is the economic power with today's innovative generation but still requiring the characteristics of the colour purple, being; a part of a community, safe clans (our people versus them) to create relevancy for organic, ecological transformation to thrive and flourish towards, "Care, Can and Commit" (Laubscher, 2013). Engaging the rebirth transformation journey therefore facilitates the process of connecting within a caring culture and provides a fertile platform for strengthening the collective communal sense of autonomy and identity. Collective stories are shared by a knowledge worker body which creates a deeper sense of belonging and unlocks the opportunity to co-create and cause the new (Wheatley, 2005).

The importance of story-telling in the rebirth transformation journey presents a pathway to communal African culture and Southern norms which help disseminate entrenched Western patriarchal norms in the workplace (Lessem & Nussbaum, 1996). These Western norms are built on silos and individualistic thinking which perpetuates separation and lack of inclusivity and promote co-creating new narratives towards success, and transformation to gain a Southern communal spirit which extends CoPs beyond the workplace (Viljoen, 2008). The power of story-telling as recreating and transforming both the teller and the listener is a form of ancient spiritual discipline in which the voice of the story resonates deep within the being and its vibrations penetrate the physical and imaginative depths of the listener (Pille, 2004).

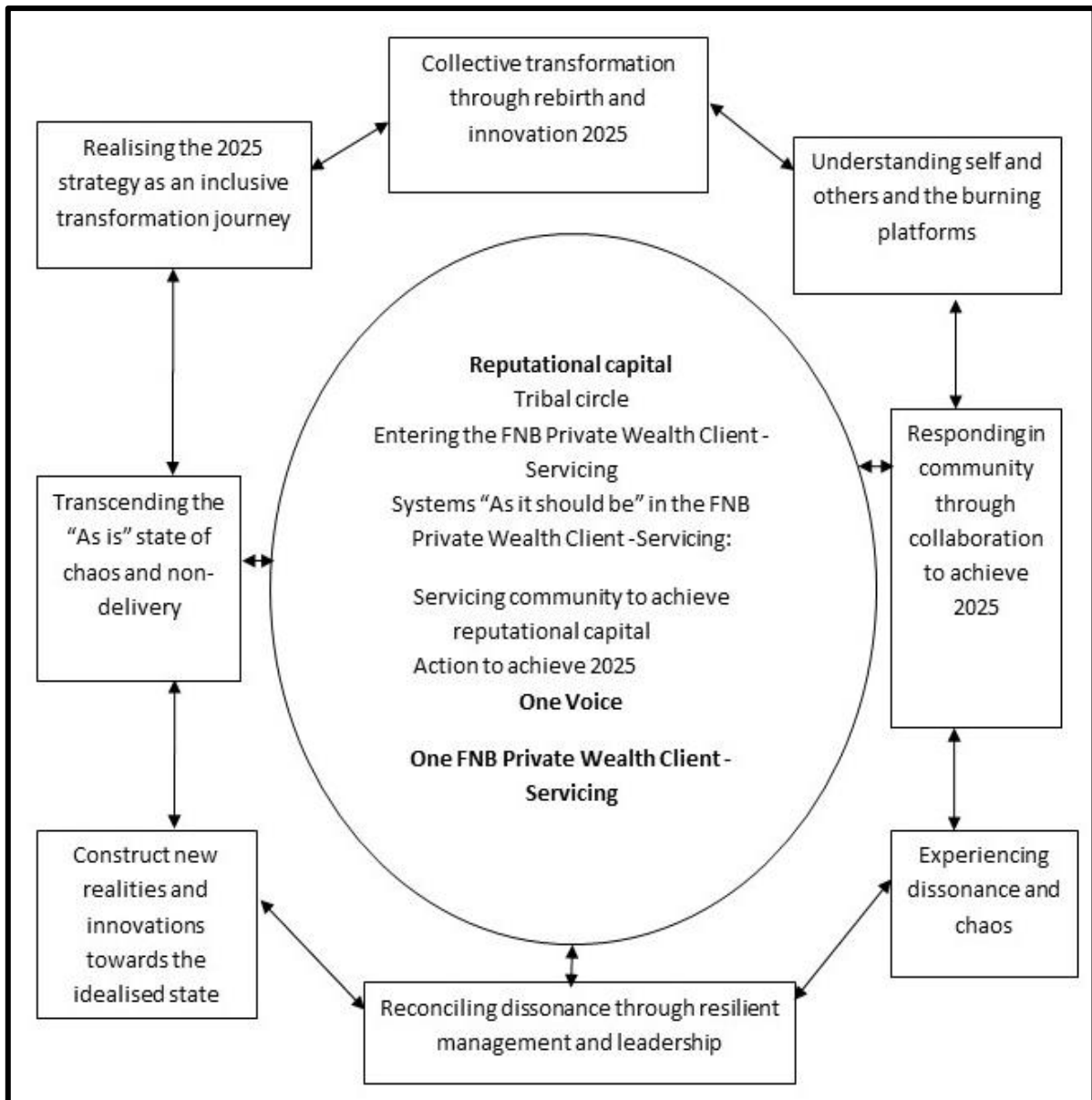
Through the rebirth journey I created a systems framework which indicated that resilience was required to offer future leaders an integral vision of harmony, prosperity and empowered work CoPs utilising true democracy, cooperation and interdependence, listening to all voices and facing organisational people challenges (Bohm, 1998). Figure 7.9 below adapted from Scharmer (2007) depicts how FNB Private Wealth Client-Servicing identified its challenges. Within these challenges is the need to break the old mental imprisonment and engage a new dance and "U" narrative towards a culture of rebirth. This culture will align to the reality of the FNB 2025 vision through technology, innovation, people and systems and thereby create a culture of innovation, servant leadership and resilience in a learning organisation.



**Figure 7.9:** The 5 steps in the U conflict management journey adapted from Scharmer (2007:9)

Figure 7.9 above illustrates how servant and creative leadership form an integral part of FNB Private Wealth Client-Servicing and questions the direction and purpose by shaping resilient people for the FNB 2025 vision through dialogue and listening (co-initiate) (Scharmer, 2007). The focus of rebirth is to develop leadership to meet the challenges identified through observing the future (co-sense) by emphasising the FNB Private Wealth Client-Servicing vision, which is based on knowledge resources and transformed by its competitive ability to produce innovative futures through deep reflection (co-inspire) and to teach the importance of a unified voice and return to the South through crucial people leadership (co-create) therefore becoming self-reliant and promoting self and thought leadership to advance integral development in the larger tribal community and integrate the new (co-evolve) (Scharmer, 2007).

Transformational leadership should drive inclusive organisational transformation through learning, and should therefore receive specific attention if it is to become successful in capitalising on the value of rebirth as organisational transformation journey. I created a rebirth transformation systems framework in Figure 7.10 below which emerged from the rebirth transformation journey in the workplace and from working within FNB Private Wealth Client-Servicing and various other organisations. Integral to caring relationships is the living out of paradoxes which contribute to making conscious, principal-driven choices to promote the capacity for making deep personal changes in community with others as shown in the rebirth transformation journey (Lessem et al., 2014).



**Figure 7.10:** The rebirth transformation systems framework - towards the end state (Senge, 1990)

Figure 7.10 above illustrates that from the current state as presented in Figure 7.1 with its challenges within FNB Private Wealth Client-Servicing, the rebirth transformation journey addresses the burning issues with a culture of low propensity to change and almost zero innovation implementation value to an environment and culture which appreciates the generation of innovative ideas and a higher level of standardisation and servicing enhancement. Exponential values will be given to indicate the positive or negative influences and impact on the systems process with the diverse variability and multimode construction.

#### **7.14 A Southern leadership perspective to manage people more effectively – The rebirth transformation journey**

Rebirth (rebirth) is strategically used to address the diverse science of change and people management within FNB Private Wealth Client-Servicing and interrogates current perceptions toward growing and becoming positioned as the preferred service provider. To implement these changes

effectively, the mind-sets of FNB Private Wealth Client-Servicing consultants and leaders need to be altered towards a more inclusive and resilient culture. The resilient culture is imperative and could be achieved by changing the style and focus of the leadership team in FNB Private Wealth Client-Servicing. The leadership style to be adopted should display qualities within a rebirth paradigm where people awareness, transparency and involvement will be paramount to introduce change, and ultimately create an ownership culture and collective responsibility in FNB Private Wealth Client-Servicing.

The financial industry is currently facing radical changes, and requires those employed within it to think and innovate beyond the schematic frame of its mental traps (Morgan, 2000). Throughout the rebirth transformation journey, deeply seated personal and organisational mental models have become out-dated rather than enhancing the capacity to deliver the FNB 2025 vision effectively. The need to improve the management of people within the culture of FNB Private Wealth Client-Servicing from traditional Newtonian consciousness to a new future vision is important and this demonstrates an appreciation for resilient leadership and inclusive transformation as described by Makwe (2003) and Viljoen (2014).

The first step to changing the internal perceptions of FNB Private Wealth Client-Servicing would be to make leadership more aware of the strategic importance of resilience; the value of the rebirth transformation journey and the inclusive transformation process which it underwrites. The rebirth transformation journey also links various business units within FNB Private Wealth into an ecological enterprise and through leadership support resilient people can become owners of this BU and negotiate the FNB 2025 vision as an urgent priority. When attempting to form a picture of the future of the FNB 2025 vision, previously accepted mind-sets regarding the management of people no longer serve the rapidly changing financial industry.

Leadership can achieve a novel approach for integral people management to thereby combine diverse realities within a determinate realm of emergence (Lessem & Schieffer, 2009). Within this supposition, the imperative is to improve a resilient culture and thereby nurture the rebirth journey within FNB Private Wealth Client-Servicing. Integral leadership lenses propose new people-based themes to investigate the current situation within FNB Private Wealth Client-Servicing to thereby recognise assumptions that shape the current view of cultural reality. This is imperative to improve the current strategy regarding people resilience as paramount to remain competitive and to achieve the FNB 2025 vision. Servant leadership as described by Greenleaf (1977) which is a Southern norm and frame for leadership thinking promotes nurturing, loyalty, justice, generosity, forgiveness, commitment, responsibility and a pledge to make an organisation a better workplace (Quinn, 2000). Furthermore, Greenleaf (1998) went on to state that people-chosen leadership is more supported by its people as they have committed and are therefore reliable, this encourages people to become the very best they can. The Southern frame is built through the philosophy of *Botho-Ubuntu*, which is referred to as servant leadership (Greenleaf, 1977).

### **7.15 Leading people within FNB Private Wealth Client-Servicing**

Leading people is an essential element for reframing the consciousness towards achieving superior client experience and delivery to achieve the capacity to embody complexity. This capacity could drive

the capability to generate diverse ideas and skills with spontaneous purposeful originality, to thereby action a different level of emotional maturity and understanding of people within FNB Private Wealth Client-Servicing. The current leadership in FNB Private Wealth Client-Servicing has a mandate to facilitate growth through engaging new methods for the facilitation of collaboration within both the internal clients of the bank and external client relationships. This is the key strategy for managing people, and leadership need to interrogate this strategy and question how it will facilitate this integral research approach successfully to redirect current mind-sets.

The current cultural status within FNB Private Wealth Client-Servicing as indicated in previous PPS scores, is influenced by a lack of strategic vision, where employees are restrained and therefore disengaged within a paradigm which lacks knowledge sharing and results in hostility and mistrust within this critical business unit (FNB Private Wealth Client-Servicing Report, 2014). Achieving leadership and managerial effectiveness involves continuously developing people skills and the rebirth transformation journey as such drives collective consciousness and therefore promotes skills for recognising challenges, interpreting information, accessing validity for flexible decision making and creative thinking to move the organisation towards the realisation of the FNB 2025 vision. Skills that originate from learning, experience and being able to take initiative forward are important.

Rebirth develops open and trusting relationships with leaders, colleagues and communities who add value collectively to learn to listen and collaborate. This aspect of rebirth could drive leaders to create climates and cultures within which people become self-motivated with efficient communication skills to analyse and manage interpersonal and intergroup relationships. Rebirth can thus drive effective conflict management skills to influence without formal authority and lead collectively towards the FNB 2025 vision (FNB Private Wealth Client-Servicing Report, 2014). The people manager's job is complex, and requires a high-level of problem-solving skills and techniques, particularly the efficient time management to develop mutual understanding of the organisational culture and emphasises the role that best suits the situation, and the perception of the cultural demands and constraints (Viljoen, 2014). People managers should develop more latitude and commitment to gain insight, and take responsibility for an inclusive transformation journey where all human voices are included (Field, 2000).

Self-confining thoughts regarding people management could be the greatest barrier to integral people development which also prohibits the embedment of creative thinking to advance and anticipate the evolution of new futures. Although many organisations believe that corporate culture is built around patterns of shared thoughts, beliefs and meaning, there could be great merit in recognising and rectifying the prison-like qualities that are still practised in a time of expanding global consciousness (Wilber, 2000). The degree to which the rebirth transformation journey is promoted impacts directly on leadership to drive a mature culture that appreciates the integral value to move beyond the current worldview and reverse engineer the future (Zohar, 2004). This can furthermore promote and encourage the advancement of integral people systems. The corporate environment in FNB Private Wealth Client-Servicing needs to become more tolerant of people generally and thereby advance open communication channels to become dedicated to support integral leadership approaches in servicing (Zohar, 2004). Openness and integrity can be acquired through the rebirth journey to support an improved openness and engagement with leaders to support the transformation process amidst the

increasingly complex and ever changing economic and emergent eco centric environment (Field, 2000).

### **7.16 What rebirth seeks to promotes**

Rebirth as an organisational transformation journey suggests an alternative way to perceive reality, moving beyond conditioning that problems are only viewed within short term temporary solutions. The rebirth transformation journey purports to teach the importance of having a unified voice and returning to the South through crucial people leadership for becoming self-reliant promoting self and thought leadership to advance integral development in the larger community. The main area of concern within FNB Private Wealth Client-Servicing is that the value of employee dignity and respect needs to become entrenched in consistent leadership behaviour where consultants are respected as they are the most important assets. It is in this regard that I outline what rebirth seeks to promote hereunder.

First, rebirth seeks to promote key tactics for distributing increased capacity within FNB Private Wealth Client-Servicing. This is a large BU within FNB Private Wealth employing one hundred and twenty people and is mandated to create client capacity in an environment where people are exposed to learning for them to grow to their full potential. This learning in progress aims to purposefully contribute toward the greater FNB 2025 vision wherein specific coaching programs are introduced. The rebirth transformation journey also promotes an organisational culture that facilitates tacit and explicit knowledge sharing and the promotion of continuous learning which suggests that the new leadership criterion within FNB Private Wealth Client-Servicing involves cultural change agency and relationship building to thereby enhance business and servicing processes. Leadership should be the advocator of inter-organisational CoEs and thereby formally recognise people champions and sponsors to invest and support integral people development (Kegan, 1994).

Second, rebirth seeks to promote resourceful leaders who are secure in ancient knowledge and the belief that they are the future mentors in an integrated society which has a vision of an integral world. Current mental models and organisational beliefs regarding the development of people, no longer fit the changing economic environment. When attempting to form a picture of integral people development, previously accepted routines become rigidities and obstacles, and no longer serve a rapidly changing global village where rebirth acts as strategy developer to achieve inclusive global transformation. It is through rebirth that the leadership in the case organisation thrives to drive inclusive and social innovation wherein transformation may occur. Furthermore, rebirth organisational transformation journey seeks to promote the role of people-based leadership to navigate and advocate organisation-wide learning and this includes designing and implementing the strategy infrastructure through networks and relationships to promote the strategic agenda.

Third, the rebirth transformation journey seeks to promote the notion that creative leadership could be promoted as the driving force behind a competitive advantage for FNB Private Wealth Client-Servicing through tradable, tangible assets, and intellectual people assets. Creative leadership is considered a distinctive capability that competitors cannot immediately replicate and is linked to FNB Private Wealth Client-Servicing creating collective people architecture and this could become visible through rebirth (Lessem et al, 2014). The new future opportunities could be facilitated by training

knowledge workers to engage and care for human capital to thereby establish resilient teams who collectively depend on leadership member exchanges and leader role expectations to collectively deliver the future of the 2025 vision into the present.

Fourth, the rebirth transformation journey seeks to promote the development-orientated leader who is characterised by servanthip, and regards people as pivotal by promoting knowledge development, and inspires trust and collaboration (Lessem *et al.*, 2014). This rebirth transformation journey endeavours to influence leadership to create a sense of purpose and direction by generating support and inspire knowledge workers to achieve collective vision and strategic intent.

Finally, rebirth as an organisational transformation journey fundamentally promotes trust and pride and develops the value of African-being in the corporate environment which translates into the global village and is relevant in this time of global shift. This transformation journey endeavours to create a collective culture of productivity, efficiency and effectiveness, to promote a mind shift towards renewed rebirth values and a practical philosophy that is owned and understood by all stakeholders. The ability therefore of rebirth to promote dialectic approaches to innovate, and not only strengthen but grow internally and establish formal external relationship synergies, can become a differentiator that sets FNB Private Wealth Client-Servicing apart from its competitors.

Rebirth ultimately aims at promoting the notion that communities can co-exist in the workplace and come to realise that within the womb of rebirth. Rebirth promotes human development as the nature of change and the role that resilience plays in the change process is a description of the dynamics of a caring culture which includes philosophical, psychological, and organisational perspectives (Quinn, 2000). It is through rebirth that the notion that communities can co-exist in the workplace and co-create together and come to realise that within the womb of rebirth, the individual self is simultaneously dealt with the collective voices of the community and the larger world (Nkomo, 2006). When a new seed is planted together as a community, it becomes the gateway for the coming into “Being” of a collective mind shift with an acute awareness towards action to thereby co-create collaboratively and not in isolation, and this can lead to a shift in thinking towards inclusive transformation (Zohar & Marshall, 2004) and Viljoen (2015).

#### **7.17 The rebirth transformation journey equips leaders to deal with conflicting situations**

Within the rebirth transformation journey conflict can become an important barrier for embedding a culture of integral people management which appreciates failure and allows creative expression. This is an important organisational aspect of FNB Private Wealth Client-Servicing and occurs between individuals and groups, within the work environment on all levels. The rebirth transformation journey aims at equipping leaders to deal with specific types of conflict and offers a process for conflict management to address the issue at hand and to deal with conflict situations.

The challenge, however, becomes the current operating level of the FNB Private Wealth Client-Servicing executive team and the project team working on a Client Quality Project. These two teams have historically been trained to operate as specialists each in their field of expertise. The financial industry has a strong tradition of creating specialists that operate in multi-disciplinary teams which leads to understanding perspectives and an appreciation for this industry dynamics as within FNB Private Wealth Client-Servicing. The lack of standardisation leads to conflict, and the result is

superficial problem-solving which is detrimental to service sustainability as knowledge workers generally follow the behaviour of leadership, resulting in FNB Private Wealth Client-Servicing employees as a collective operating in silos instead of delivering standardised best practice. It is important for leadership to take a leading role in establishing a clear structure with rules, standards and regulations for handling conflict situations in organisations. Diverse sources of conflict can give rise to negative or positive actions taken by the parties which can be incompatible with one another and lead to negative consequences and outcomes (Laubscher, 2013).

When conflict creates a stand-off and parties are not open to communication, the consultant engages to promote effective communication allowing opinions and ideas to be verbalised, facilitating group members to be attentive to one another, accepting of the ideas of other members, and influenced by the diverse interpretation and practical solutions. Fewer difficulties in communication occur, and the understanding of others interests and concerns becomes apparent whilst realising what the collective intent is, and how all parties can become empowered (Quinn, 2000). All voices are heard and enhanced, and collective benefits create collective capabilities and power for achieving an effective solution for all parties concerned (Wheatley, 2000). The conflict manager should be aware of critical rejection within both parties and build confidence by giving equal opportunity to both sides in the conflict situation (Quinn, 2000).

#### **7.18 Formalising organisational change and development connection strategy through rebirth**

Connecting is the most important resilient factor within the FNB Private Wealth Client-Servicing organisational change and development strategy (Viljoen, 2008). Through connectivity, the inside-out approach protects the core of people engagement and expands the periphery of FNB Private Wealth Client-Servicing. The barriers to the inside-out are a rigid mind-set on the organisational core and the control of mind-sets with external partnerships. In a world characterised by rapid change, the management of people within this BU requires a more fundamental appreciation of the total environment in which it operates. Only when a manager can identify all the elements that constitute that environment will it be possible to identify a sustainable solution to achieve connectivity.

Most of the challenges in FNB Private Wealth Client-Servicing do not exist in isolation but tend to be a complex interaction between numbers of variables. Detailed analysis of this BU's challenge cannot be seen in isolation of the total operational environment as it severely limits the leader's ability to identify sustainable solutions. The rebirth transformation journey may thus be used as a tool to enable managers to gain insight into the context in which they should operate and affords the opportunity to find solutions that are more elegant than when they had used a purely analytical or reductionist approach allowing for transformation to emerge.

All FNB employees are encouraged to participate and find new idea generation to solve for problems and issues which represents the company to achieve a competitive resilient advantage stance. The rebirth transformation journey encourages and supports employees within FNB Private Wealth Client-Servicing and knowledge workers in creating new creative competencies and innovations that are sustainable driving organisational change and development (Kumpfer, 1999) and Field (2000). The competencies required by future leaders to lead concomitantly with vision are toward effective communication, strategic alignment, enabling continuous learning, creative leadership through

information sharing, allowing autonomy and development of trust and integrity throughout FNB Private Wealth Client-Servicing (Nkomo, 2006).

### **7.19 Spiral Dynamics as an essential archetype within the rebirth transformation journey**

Spiral dynamics is an archetypal model which describes how people from all walks of life think and develop through the use of colour (Beck & Cowan, 1996). It untangles the complexity of human existence in shaping human nature, creating global diversities and driving change. Spiral dynamics is about how and why people make different decisions, have different responses and how and why values arise and spread and ultimately drive the nature of change (Beck, 2013). During the rebirth transformation journey, spiral dynamics was introduced to address the leadership thinking levels through the higher integral brain and the emotional maturity of leadership to become more conscious and apparent during this organisational transformation journey.

Spiral dynamics provides perspective on the self-stream and their waves of consciousness unfolding into different streams. These streams proceed relatively independently, while FNB Private Wealth Client-Servicing leadership can simultaneously operate at many different waves within their various roles realising that spiral dynamics introduces states of consciousness and cover the higher, transpersonal waves of consciousness. Spiral dynamics thus gives leaders a useful and elegant framework of the self and its journey through the waves of existence in the social, economic and political environments Beck and Cowan (1996); Laubscher (2013). Leadership utilise a meme as a psychological structure and value system, within a mode of adaptation which could be expressed in numerous ways in the workplace from worldviews to governmental forms (Viljoen, 2008). Dawkins (1989) defines meme as living structures metaphorically and technically. The various memes are the different worlds of the leaders and develop along the great spiral of existence which includes body, mind, soul and spirit driven by internal dynamics and shifting life conditions.

Inspiring and motivating leaders empower and enable an understanding of spiral dynamics to inspire employees through their actions and leadership skills to thereby form role models to follow (Laubscher, 2013). Leadership needs to motivate and steer the culture towards a direction as the rebirth transformation journey includes managing and promoting diversity and cultural flexibility to develop leaders to impact the functioning more efficiently in an environment of cultural diversity to become skilled and respect others by displaying tolerance for cultural differences as well as understand these differences. Leadership needs to become skilled in both verbal and non-verbal communication; read body language and diffuse conflicting situations (Martins & Martins, 2000).

FNB Private Wealth Client-Servicing embarked on a rebirth transformation journey to drive a cultural change strategy to embrace world class service and leadership development. There has been focus on developing spiral dynamics for leadership skills through coaching and development as key drivers within the field of study. Wherein the results should lead to successful improvements in systems, processes and procedures to establish an integral people systems matrix which can monitor and drive a resilience system which includes all functions and aspects of the FNB Private Wealth Client-Servicing operations and financial service delivery to valued clients Beck and Cowan (1996); Laubscher (2013). Laubscher (2013:119) states the following regarding memes and their use in spiral dynamics:

“<sup>v</sup>Memes refer to a core value system that acts as organising principles and expresses itself through memes. The prepended and superscripted letter <sup>v</sup> indicates these are not basic memes but value

systems. Value systems include basic memes (Beck & Cowan, 1996). Lessem (nd) explained that each Meme reflects a worldview, a valuing system, a level of psychological existence, a belief structure, an organising principle, a way of thinking or a mode of adjustment deep within evolving human nature itself.”

Within spiral dynamics, each of the first-tier memes thinks that its view is the correct or best perspective and reacts negatively if challenged, using its own tools, whenever it is threatened. This status in the rebirth transformation journey begins to change with second-tier thinking. Second-tier consciousness is fully aware of the interior stages of development—even if it cannot articulate them in a technical fashion (Beck & Cowan, 1996). The colour beige represents the archaic-instinctual on a level of basic survival which is food, water, warmth and safety. Habits and instincts are important just to survive and the distinct self is barely awakened or sustained which forms into survival bands to perpetuate life. This colour can also influence the perspective taken on managing people in organisations and beige is on a survival level. Diversity is inherent and should be embraced as it enhances the collective need for managing people for future sustainability (Bellman, 2000). Therefore, leadership should set an example and change the mind-set (Beck & Cowan, 1996).

Purple represents community, safe clans (our people versus them) creating relevancy for organic, ecological transformation to thrive and flourish towards, “care, can and commit” (Laubscher, 2013). It therefore facilitates the process of connecting within a caring culture and provides a fertile platform for strengthening the collective communal sense of autonomy, identity. The colour red represents the need for power Gods and the first emergence of a self-distinct from the tribe which is impulsive, egocentric and heroic (Beck & Cowan, 1996). Mythic spirits such as dragons, beasts, and powerful people represent leaders as feudal lords protect underlings in exchange for obedience and labour. Creative leadership can thus drive the FNB Private Wealth Client-Servicing networking practices which are contextualised within vision, continuous learning and easy access of information with all communities of practice and cause them to break free and be strong. Within the context of FNB, purple and red represent its customers. Customers are key revenue drivers to FNB and thereby deserve cutting-edge innovative solutions for their banking needs.

The self that escapes from the herd mentality of blue seeks truth and meaning within individualistic terms of hypothetically deductive, experimental and mechanistic sources. Blue order is very uncomfortable with both red impulsiveness and orange individualism. Blue drives purposefulness towards a predetermined outcome (Beck & Cowan, 1996). It is rooted in authenticity and the rule of law. It is in this context wherein FNB’s compliance culture is represented in blue. Green egalitarianism cannot easily abide excellence and values rankings, big pictures, or anything that appears authoritarian, and thus it reacts strongly to blue, orange, and anything post-green (Viljoen & Thomas, 2018).

Within spiral dynamics, the colour Orange represents scientific achievement. The world is a rational and a well-oiled machine with natural laws that can be learned and mastered and manipulated for one's own purposes. Highly achievement-oriented people are moved toward materialistic gains and the laws of science rule politics, the economy is a chessboard on which games are played as winners gain pre-eminence and perks over losers. What none of the spiral dynamics niches can do on their own is to fully appreciate the existence of the other niches. Orange within the FNB context represents

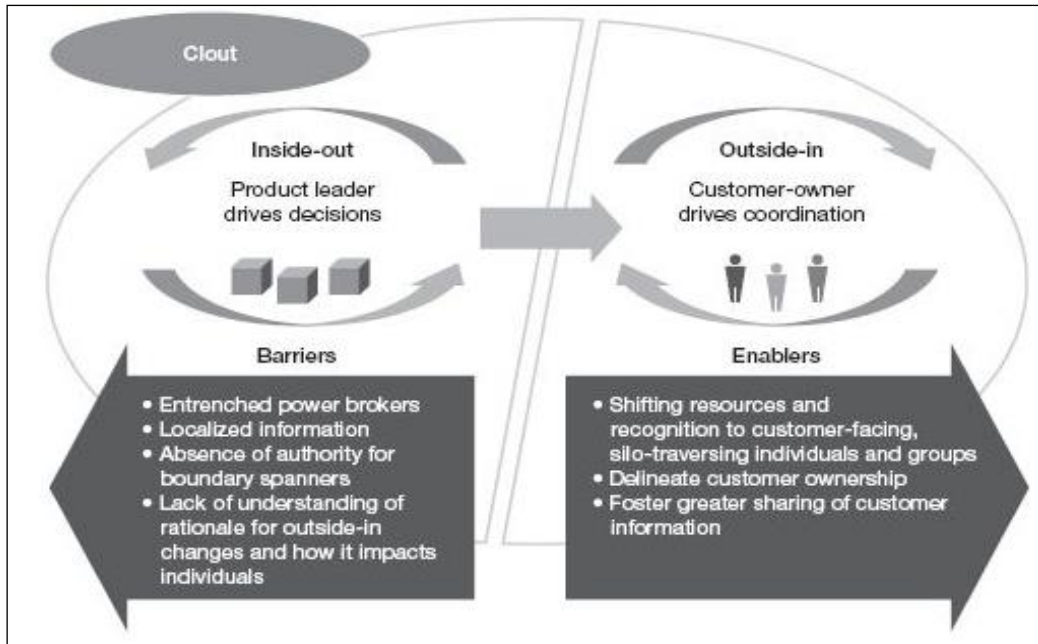
middle-management wherein they are more concerned with advancing themselves, driving strategy, being competitive and ultimately coming out as the top achievers. Where the green meme uses early beginning vision-logic to grasp the numerous different systems and contexts that exist in diverse cultures in the workplace, second-tier thinking goes one step further, and begins to integrate pluralistic systems into integral and holistic spirals and holarchies (Beck, 2003).

There are two major waves to this second-tier thinking represented by the colours, yellow and turquoise (Beck et al., 2018). The colour yellow represents integrative life as a kaleidoscope of natural hierarchies, systems and forms. Flexibility, spontaneity and functionality have the highest priority while paradoxes and pluralities can be integrated into interdependent, natural flows as egalitarianism is complemented with natural degrees of excellence where appropriate. Turquoise represents wholeness of existence through mind and spirit, states Beck and Cowan (1996). They further state that within the colour turquoise there is connection to whole as a collective mind.

Knowledge and competency should supersede rank and power. The prevailing world order is the result of the existence of various levels of reality and interpretations in the workplace and the inevitable patterns of movement up and down the dynamic spiral. Good governance facilitates the emergence of entities through the levels of increasing complexity and leadership in FNB Private Wealth Client-Servicing should be aware that people relationships and engagement are essential (Beck & Cowan, 1996). Collaboration is an essential ingredient for managing people to establish future sustainable success and this can be obtained through continuously developing people. The collaboration and coordination of teams are essential for the successful harnessing of creativity through individual and inter-community exchanges.

Within financial based organisations different coordination situations are identified for the development of communities of practice and the implementation of innovation through linkages with internal and external partners. The colour turquoise represents holistic and universal systems, and holons of integrative energies unite with knowledge of multiple levels interwoven into one conscious system. Leadership within FNB Private Wealth Client-Servicing needs to become more resilient to integrate spiral dynamics as a supportive intelligence to deal with the challenges in the rebirth journey and to develop clout (Beck & Cowan, 1996).

Figure 7.11 below presents the incorporation of establishing clout as a resilient people management strategy within FNB Private Wealth Client-Servicing. Clout can be evaluated through the resilience that human capital holds to premature closure and the capacity for stability within an ever-changing environment. Clout is enabled through fostering keen relationships with customers and delineating the process of customer ownership. The sharing of customer knowledge and the building of communities of practice is promoted through the rebirth transformation journey and is imperative for achieving the collective 2025 vision (Adams, 2005).



**Figure 7.11:** Resilience through Clout – to drive FNB Private Wealth Client-Servicing’s Resilience People Strategy (Kumpfer, 1999)

In Figure 7.11 above, the second criterion for organisational change and development strategy is introduced and shows that the rebirth transformation journey drives change and decision-making within FNB Private Wealth Client-Servicing to improve skills resources and development for customer engagement and the sharing of customer information to eliminate the barriers entrenched by power brokers, localised information, absence of authority and the lack of understanding of client needs. It also introduces clout as FNB Private Wealth Client-Servicing’s major challenge for future sustainable competitive advantage.

One of the barriers in people dynamic simulation is clout, as Client-Servicing consultants use localised information to access information and store information through communities of practice as an imperative for future service success. By shifting resources and recognition to customers FNB Private Wealth Client-Servicing could foster more meaningful relationships with internal and external customers and this outside-in approach clearly indicates how the need for redistribution of Clout has become imperative within this business unit and introduces the complexity of the systemic reality (Kumpfer, 1999). Organisational environments which appreciate trust, communication and collaboration are needed to enable and deliver organisational change and development through clout.

## 7.20 Contextualising archetypes

Myss’ (2003:np) archetypes were used during the rebirth transformation journey. As described in Paragraph 7.11.2 of this chapter, Myss defines archetypes as ancient patterns which exist within human consciousness. These archetypes are neutral and manifest in both positive and negative light. In the rebirth transformation journey, archetypes are used to empower and to equip FNB Private Wealth Client-Servicing CoPs and CoEs to own both the positive and negative attributes of their being and embrace a posture of wholeness.

The rebirth transformation journey fundamentally turns to the South to present important pillars and archetypes on which African values and leadership are formed. The warrior promotes self-discipline, self-control and tenacity within the tribe. Maternal leadership considers the African warrior, as an important frame of reference within which to embody collective values regarding the environment as valuable to the rebirth transformation journey and within the South translates into the tribal circle (Field, 2000). The warrior ethic is imperative as in the example of Nelson Mandela who embodied servanthip within his purpose where he also honoured his ancestral and tribal values within the Southern path (Nkomo, 2006) and (Lessem *et al*, 2014).

### **7.20.1 Using archetypes to manage conflict in rebirth**

During the rebirth journey, conflict can become an important barrier for embedding an integral innovation culture which appreciates failure and allows creative expression. This is an important organisational aspect of FNB Private Wealth Client-Servicing, and occurs between individuals and groups within the workplace at all levels. Conflict links with psychopathology, disruption, violence and disorder. These become harmful potentials of conflict when it takes a destructive course but when a constructive conflict is achieved, it is potentially of considerable personal and social value as it generally prevents stagnation and enables a harmonious workplace (LeBaron, 2005) and (Banhegyi & Banhegyi, 2006). It is the medium through which problems and disputes can be openly discussed and creative solutions developed, and it becomes the driver for personal and social change within FNB.

Conflict within teams should be dealt with immediately, as conflict impairs cooperation and productivity among the members of a team (LeBaron, 2005). It is important to gauge when conflict takes a destructive course as when a disagreement occurs that it is helpful to strengthen the relations among team members to thereby enhance productivity when it takes the form of controversy (Viljoen, 2008). Conflict occurs whenever incompatible activities create an action that is incompatible with another action which prevents, obstructs, interferes, injures, and creates a less effective and unified situation. Conflicts may arise between two or more parties or groups with opposing interests, goals, values, beliefs, preferences, and a misunderstanding regarding decision-making and therefore strategies and procedures that deal with tools to manage conflict are important (Viljoen, 2008) and (LeBaron, 2005).

It is also important that leadership take a leading role in establishing a clear structure with rules, standards and regulations for handling conflict situations within FNB. If they do not give rise to incompatible actions, conflict is naturally dissipated. The terms competition and conflict are often used interchangeably. This reflects confusion because although competition produces conflict, not all instances of conflict reflect competition. Competition implies an opposition in the goals of the interdependent parties such that the probability of goal attainment for one party decreases as the probability for the other increases. In conflicting situations that are derived from competition, the incompatible decision-making action reflects incompatible goals. However, conflict may occur even when there is no perceived or actual incompatibility of goals or intent.

Thus, if two team members of a sales group are in conflict about the best way of increasing mutually exclusive goals, their goals may become concordant but the distinction between conflict and competition is not merely to find an immediate solution it is about finding a sustainable solution that empowers both parties. It is important and basic to a theme that underlies much of the work. Namely,

conflict can occur in a cooperative or a competitive context, and the processes of conflict resolution that are likely to be displayed will be strongly influenced by the context within which the conflict occurs. The use of archetypes to manage conflict in the rebirth transformation journey within the FNB case study prompted for inner and authentic scrutiny amongst the community and the leadership highlighting their own battles within themselves where single individuals challenged themselves with which shadow archetype(s) they need to dispel and which archetype they wished to inculcate to grow out of the old environment and co-create the new. The archetypes used within FNB Private Wealth Client-Servicing are attached in Appendix F which depicts eight archetypes within this BU as captured during the rebirth transformation journey.

It is through the archetypes challenge where the rebirth transformation journey identified these shadow archetypes as barriers and a passage towards transformation, and it is during rebirth where these archetypes could transform and manage their own challenges through holding one another accountable whilst owning their shadow archetypes to manage internal conflict. Resilient leadership drives sustainable creative insight and new ideation, and therefore dynamic action is taken through communities of practice and communities of experts to establish formal creative engagement with the reconnoitre as the leader in terms of the innovation knowledge roles who responds to change. It will be critical, therefore in the rebirth transformation journey, to allow time and space for creative energy and innovation to emerge.

It is not simply a matter of working for an organisation that has an impact, but also seeing the value and impact of the specific work that is done. Systems are required to become aligned to drive future value and thereby make a positive contribution through tangible evidence toward achieving the bigger picture within diverse systemic elements to find solutions for the current challenges in FNB Private Wealth Client-Servicing. The diverse elements of vision technology systems within servicing therefore need to be integrated into the rebirth journey. This will enable the understanding of how to integrate all these elements to drive this culture of change with a system approach successfully. It is important to keep in mind that there is a need for stakeholder clarity, alignment and transparency about the purpose of the potential impact of systems myths.

If the implemented systems drive information toward making a positive difference in creative ideation and integral innovation, the rebirth journey should achieve inclusive transformation. This means that servicing shifts from the old paradigm of operating as a traditional call centre as opposed to becoming a hub of service excellence where innovative systems direct the FNB brand towards new paths to achieve client value proposition and experience through its philosophy of “I Care, I Can, I Commit” which is also embodied in the 2025 vision. The rebirth transformation journey systemically endeavours to achieve increased reputational capital through resilient leadership.

## **7.21 Leadership and Resilience**

### **7.21.1 Engaging the rebirth transformation journey in building resilience and creative leadership**

The people-centred challenge discussed within this thesis focuses on people within a financial services business unit whose sole mandate is to grow client loyalty and increase scalability by providing enhanced servicing to produce an unparalleled client experience. Within this mandate there is an urgent need for driving client loyalty through managing people to grow market share within the highly competitive Private Wealth market where the need for superior service has peaked. The challenges

faced by the FNB Private Wealth have diverse deliverables and cultural implications toward successfully achieving them. FNB Private Wealth Client-Servicing is competing in the knowledge economy where rebirth is an organic and inclusive transformation journey and a new science which seeks to promote resilience within novel idea generation and innovative action, which could translate into competitive financial products and services.

Rebirth (rebirth) also proposes creativity as a principal element for driving novel ideas that are uncommon yet acceptable responses to produce work that is novel and appropriate to achieve a resilient human capital base and the future vision of FNB Private Wealth Client-Servicing (Amabile & Kramer, 2007). To be counted as a global role player, organisations must portray change resilience (Kets de Vries, 2001). Rebirth as a transformation journey endeavours to equip leaders in FNB Private Wealth Client-Servicing with courage to become willing to stand up for innovative ideas even if they are unpopular with other leadership and teams. These leaders become responsible for their actions and mistakes, and imbed values, morals and integrity. Matupire (2014) states that, “personal values play a crucial role in setting standards of performance and in determining the success levels achieved.” He further goes on to say, “Integrity, for example, is one of the most respected and admired qualities of leaders in every area of activity (Tracy, 2010).” Integrity refers to doing what is morally and ethically correct, and not to abuse leadership privileges, and this makes leaders clearly visible as consistent role models. These leaders become responsible leaders who honour, and do not belittle, the opinions of other knowledge workers regardless of their status and position in the organisation.

The cognitive and creative skills of knowledge workers are linked to motivational levels, and thus create the interface for individual vision and knowledge exchange to translate into a resilient FNB Private Wealth Client-Servicing culture (Botha & Schutte, 2003). The rebirth transformation journey could foster an environment which facilitates new creative opportunities while creative leadership provides direction, motivation and a supportive climate to shift the culture in FNB Private Wealth Client-Servicing towards resilience amidst inclusive transformation. Rebirth could propel the creation of valuable contributions to FNB Private Wealth Client-Servicing regarding ideation and novel processes. With knowledge workers working together in complex social systems, they in turn can add value to achieve the collective FNB Private Wealth Client-Servicing goal through skills, cognitive style, personal elements and contextual influences (FNB Private Wealth Client-Servicing report, 2014) and (Veldsman, 2002). Resilience therefore creates a culture of navigating change and driving innovation through consistent sharpening of the eight human aspects within an ecological system.

## **7.22 The nature of rebirth and resilience in the workplace**

Resilience lies at the heart of human evolution, and plays a critical role in the rebirth journey to successfully adapt to situations despite adversity. Resilience refers to the psychological ability to let go of past internal structures of thinking and behaving that over the years have given a sense of stability and coherence (Reivich & Shatte, 2002). Resilience impacts the capabilities of FNB Private Wealth Client-Servicing to create and reintegrate new structures of thinking and behaving that provide a more mature sense of coherence (BarOn, 2005). Resilience enables knowledge workers to see reality and judge the likelihood of desirable outcomes. Resilience is important to the mental well-being of communities of practice as it supports the disruption and integration process which constantly occurs within FNB Private Wealth Client-Servicing.

A failure to be resilient can lead the rebirth transformation journey toward disordered behaviour, stagnation, and increased vulnerability and the failure to re-integrate functional thinking structures can create a sense of chronic destabilisation (Wheatley, 2002). Organisations are often challenged to evolve toward achieving a more mature strategy towards their strategic vision. The evolution of human maturity as an emergent, oscillating and spiralling process marked by progressive subordination of past, lower-order behaviour systems to newer, higher-order systems as existential challenge in the cultural transformation (Beck & Cowen, 1996). The rebirth evolution is personal in that ultimately each person must choose transformation and commitment while evolution is communal and the impetus for change is collective where the entire community is responsible for change (Beck & Cowan, 1996).

The purpose of rebirth as an organisational transformation journey is to transform present perspectives and challenges in organisations by reconfiguring the meanings generated from the collective learning. It is through collective learning that culture may be transformed to convert the minds and hearts toward that which is true, moral, life-giving and liberating to Call. Deep transformation translates to surrendering control and letting go of old beliefs, assumptions, and behaviours that no longer serve the best interests of an organisation (Ackerman, 1997). Rebirth and resilience promote the successful transformation process that leads towards new beginnings (Senge, 2003). The transformation is initiated by a stress point, a bifurcation that brings into attention a sense of dissonance and dis-ease, the crucial issues in an organisation. Although the source of the stress is linked to internal and external sources such as work-related demands, the transformation process is personal in that it requires introspection and wilful actions of all communities of practice members.

A challenge to the transformation journey is to let this homeostatic structure dissolve, as it no longer serves its best interests and is interfering with the ability of achieving its set goals and voice authentically. Dissolving structures in FNB Private Wealth Client-Servicing presents the challenge of living in a state of chaos, questioning identity and seeking for new potentialities within the environment. While in this state of chaos knowledge workers may no longer feel coherent and predictable. Chaos is viewed positively for it bears new possibilities that hold energy needed to reconcile various dissonances to create new beginnings for the collective strategic intent (Quinn, 2000).

A critical characteristic of resilience is the ability to form a trusting, collaborative relationship among all knowledge workers to thereby establish a supportive culture for transformation to occur. A culture of respect and friendship allows employees to share values that give meaning and purpose and allow the sharing of feelings and frustrations, which support the processing of thinking to move forward collectively. Knowledge workers recovering from emotional disruptions do much better if they are surrounded by a network of understanding leaders and community of practice members than if they emerge from their trouble by an indifferent culture. Resilience requires emotional intelligence to compromise the collective sense of autonomy to strengthen trust and the ability to relate to multiple complexities (Wheatley, 2002).

For resilience to thrive there needs to be a supportive culture. An important feature of a supportive culture is open communication where knowledge workers are willing to promote open communication whilst sharing ideas, hopes, and disagreements and there is tolerance for conflict, and

when disagreements require resolution, the support through reconciliation is available. Open communication creates an environment in which there is on-going respect for all knowledge workers and communities of practice. A supportive environment is centred on human values which guide decision-making, including the basic values inherent in the rebirth transformation journey which represent the essential ingredients towards an organisational evolution.

### **7.23 Conclusion**

In this chapter, I introduced and explained the rebirth transformation journey, what it entails as a transformation process and how it seeks to contribute a new Southern value proposition with FNB Private Wealth Client-Servicing. The journey embarked on in-the-case organisation to achieve the greater FNB strategic 2025 vision was also presented. I also discussed the constructs used in rebirth and purpose of rebirth as a transformation journey towards inclusivity through community. Leadership, the Southern way is a strategic driver in maternal African leadership resulting in the Southern way of leadership being and becoming as the new value proposition. I also depicted the current state and projected the desired ideal state in the form of causal diagrams illustrating the relationship and collective output which rebirth brings about.

The rebirth transformation journey within FNB Private Wealth Client-Servicing addressed its challenges, and provided solutions for these challenges towards social inclusive transformation through authentically and purposefully entering the unknown to innovate. The rebirth transformation journey also created an ecological shift integrating integral healing from self, community, organisation and society. This shift influenced existing leadership models resulting in the greater FNB being interested in exploring the rebirth transformation journey as inclusive frame for future transformation endeavours. Chapter 8 of this thesis presents my participative observations and the collective CoP voices in rebirth.

## CHAPTER 8: Participative Observations and Collective CoP Voices in rebirth

*We are people of the day before yesterday and a people of the day after tomorrow. Long before slavery we lived in one huge village called Africa. And then strangers came into our midst and took many of us away scattering us to all the corners of the earth. Before those strangers came, our village was the world; we knew no other. But we are now spread out so widely that the Sun never sets on the descendants of Africa. The world is now our village, and we plan to make it more human between now and the day after tomorrow.*

-Mazrui (1986:34)

### 8.1 Introduction

In Chapter 8, I present the researcher's participative observations and collective CoP voices as taken from the data-gathering in the rebirth transformation journey. This represents the raw data which serves as living theory as a result, the CoPs experience of embarking on the rebirth transformation journey. The rebirth transformation journey within FNB Private Wealth Client-Servicing was formally introduced in 2012, and is an emerging process. The research process was essentially administered to the selected CoP (respondents and participants) that formed part of the community of practice including leadership, management and consultants within FNB Private Wealth Client-Servicing. This process was conducted to obtain metadata and background on the efficiencies of the rebirth transformation journey within FNB Private Wealth Client-Servicing to monitor progress of this new phenomenon within an otherwise technically inclined and highly regulated environment whose consciousness traditionally resided in North Western paradigms driven by capital consciousness (Lessem & Schieffer, 2009).

Simultaneously, this research process serves as a precursor to build a broad foundation for epistemological access, and the ontological argument that will underscore this living theory journey as a scientific process. The chapter demonstrates how auto-ethnography was applied as a data-gathering method and the impact thereof. This data is closely linked to the FNB case as ultimately this is the landscape within which the rebirth transformation journey was deployed. The research data capture voices of the CoP which within this study were also the PAR team. The CoP voices therefore capture the period during and post rebirth. However, the researcher will begin by contextualising the problem statement and dire challenges facing this BU pre-rebirth; why rebirth and outcomes thereof. Within the research methodology as presented in Chapter 6 of this thesis, participative observation becomes an area of focus, presenting my research observations and the collective communal voices in rebirth. This forms part of a triangulative method applied by using integral methodology.

Within this chapter the researcher's observations are also aligned to methods used to gather voices within the case study which focuses on specific burning platforms identified in deploying the research transformation journey as indicated in the results of the PPS scores. These focus areas were identified by leadership as necessary to underscore the impact of deploying the rebirth transformation journey within the greater FNB Private Wealth Client-Servicing and being the criteria for which the impact of deploying rebirth within this BU can be measured against. The information contained herein represents a micro-lens of a macro-landscape report containing greater detail, and therefore captures aspects of three critical phases in this journey being: pre-; during and post-rebirth.

## **8.2 Contextualising FNB Private Wealth Client-Servicing and its challenges within the FNB case**

As referenced in Chapter 4, the story of FNB Private Wealth Client-Servicing is a BU within FNB that has become a liability within the greater FNB business. This BU presents several risks including loss in revenue, high turnover of staff, low engagement, lack of trust, low service levels, and an ethos built on low self-esteem with little desire for development by the consultants and a culture built on lack of professional etiquette and non-performance (FNB Private Wealth Client-Servicing report, 2012). The result and impact of the human disconnect in the system culminates in substantial loss in revenue, a rise in fraud risk based on negligence, servicing levels which impact continued client relationship, and a growing disconnection to the greater business (Khoza, 1994). These results in the BU are perceived as not strategic, and not adding any value. Considering these challenges and the greater FNB business vision towards 2025 and to grant this unit a last attempt for survival, a new Head is appointed with a mandate to transform this unit, the result of which I am called to come and head the transformation programme for the business. In line with this mandate, I design and deploy a rebirth transformation journey whose sole objective is to transform this BU in an inclusive manner (Viljoen, 2008).

The critical considerations in designing the solution to transform this BU centre around strategic drives towards vision 2025 being: “To be a great business helping to create a better world”, aligning to the strategy being: “Building rewarding relationships with our customers, suppliers, and colleagues” (FNB Private Wealth Client-Servicing report, 2014). Both the FNB vision and strategy illustrate its subconscious need for doing business ecologically and in an integral manner balancing the four inner and outer worlds, thereby bringing man, science, enterprise and spirituality into the centre (Matupire, 2014). The FNB strategy seeks to ground its purpose for existence through acknowledging the importance of locating identity in its humanness and the gift of relationship in community (Hofstede, 1996). The vision and strategy supported by strategic pillars of people, innovation and efficiencies become the foundation from which the rebirth transformation journey can be introduced within FNB Private Wealth Client-Servicing as it is within these three pillars that this BU is facing major challenges (Celliers, 2014). Within these pillars emerged themes and sub-themes which will be discussed in the thesis (Jackson, 2000).

## **8.3 Research data-gathering, participative observations and collective voices**

The study is a qualitative study using qualitative methods to gather data as presented in Figure 6.1. These data-gathering methods used in conducting research within the FNB case with the process designed to gather pre-, during and post-data in rebirth. Auto-ethnography as oral history and personal lived experience in qualitative research grounds to Call through IRA (Viljoen, 2016). Listening survey, community engagements which according to Hope and Timmel (1996) encompassed facilitated deep listening and understanding participants’ emotions throughout the rebirth transformation journey. The role of CoPs as introduced and presented in Chapter 5 enabled FNB Private Wealth Client-Servicing to consciously co-create to cause social innovation and inclusive transformation as CoPs shared a common objective, to innovate (Lave & Wenger, 1991). Through focus group discussions as a means of gathering data; participants actively contributed meaningful insights on the impact of rebirth whilst four in-depth-interviews were conducted to provide information on people, their experiences and insights through structured questionnaires (Viljoen, 2008). To further ground REBIRTH as my contribution to the field of study as an OCD practitioner, I used participative observations to identify key informants for this research and conducted surveys,

encouraged journaling, taking down notes and used archetypes to critically bring out the collective voices in the South (Emig, 1971); Lessem and Schieffer (2009).

#### **8.4 Research observation report: pre-, during and post-rebirth**

This report captures the researcher's observations on a broad perspective in terms of specific categories which became important, and underscored the rebirth transformation journey.

##### **8.4.1 Strategy and Vision**

Prior to embarking on the rebirth transformation journey, FNB Private Wealth Client-Servicing had never engaged in strategy discussions, and therefore had no understanding of the value of strategy and how strategy drives performance. Embarking on workshops to facilitate strategy discussions, initially with the leadership and later with the CoPs of this BU to understand its mandate and how to deliver on it became a transformational and liberating experience, unlocking new capacity, growing awareness and building a desire to learn resulted in embracing the rebirth transformation journey as opportunity rather than a threat despite the underlying fear of venturing into the unknown (Kets de Vries, 2001).

In line with the 2025 vision, FNB Private Wealth Client-Servicing's mandate shifted to that of moving from good to great as defined in the business mandate being (g2G100<sup>813</sup>) as presented in Chapter 7(FNB Private Wealth report, 2014) and Collins (2001). This new mandate necessitated a shift in thinking creating new consciousness towards Wealth Client-Servicing's inner four worlds towards being, becoming, knowing and doing to thereby create ecological shift within the greater FNB, thereby integrating its outer four worlds (Lessem & Schieffer, 2010). The result is that this BU was now required to craft a strategy that would align its vision to the greater business strategy. Discussions to craft a meaningful strategy for this BU were conducted and facilitated by me as researcher first with the business head, and a core of his leadership team. This process was facilitated by using the culture pyramid.

Strategy discussions were conducted wherein the greater servicing community participated to collectively shape and co-create a vibrant strategic statement that would form as a framework for crafting the envisaged future (Wilber, 2000). These discussions created a platform for collective buy-in towards the rebirth transformation journey. Strategy discussions within this BU planted a seed for engagement and created open spaces for collaborative engagement driven through open communication. This formed a basis for engendering a sense of belonging, bringing meaning and developing a sense of common identity within this BU, resulting in a shift in consciousness (Lessem & Schieffer, 2009). Strategy understanding therefore became a propeller for building an end-to-end transformation plan touching on technology, people and systems. This resulted in Wealth Client-Servicing increasingly feeling acknowledged and that it had a "seat at the table," resulting in a growing need to drive organisational learning as new capital and position the competence in this BU within the greater business.

FNB Private Wealth Client-Servicing strategic vision:

1. We are an aspirational hub of service excellence and innovation.
2. We deliver on our business mandate which contributes towards the FNB Wealth Strategy of g2G100<sup>813</sup>
3. Through innovative thinking, we drive a culture of change that enables a sustainable business
4. Our people are the epicentre of our business and we invest in nurturing and unlocking their full potential.
5. We therefore commit to our service philosophy of 'I Care, I Can, I Commit'

The following captures the voices of the CoP on the journey towards developing the FNB Private Wealth Client-Servicing vision and its impact on unlocking open communication within this BU:

"It has changed my perception of the service suite; I have learned a lot more about the future of our servicing environment and the growth prospects that are available not only for the environment but for the greater business." "This has helped with creating a shift indefinitely changing the culture for the better. People are more energised, focussed and happy." "Through understanding the strategy and our vision a culture shift has occurred whereas previously it was considered a hostile environment." "The culture that has developed in our environment has given the sense that most are working together to improve working conditions as a team and not as individuals." "It has allowed me to think out of the realms of work and approach life from a broader perspective." "It has resulted in a change in culture that is evident making it a place where more and more people are willing to be positively involved." "This has meant that the mob justice culture has slowly reduced as people hold each other accountable, consultant to consultant and leader to leader." "We are moving towards a more innovative culture challenging the status quo." "It has been an eye opener and has really transformed the way I think and my attitude towards the business." "It has kept me positive in my personal and work life making me enjoy the journey." "The strategy has resulted in a culture that makes every day feel new and meaningful."

#### **8.4.2 Driving organisational learning through rebirth and active CoP engagement: Pre-and Post**

The rebirth transformation journey created opportunity within this BU for cementing organisational learning by using established communities of practice to facilitate various projects within the rebirth transformation journey to facilitate knowledge exchange (Lave & Wenger, 2001). Organisational learning became central in Wealth Client-Servicing because of the practical engagement of this new people form increasing creativity and harnessing potential within this BU. Learning also became increasingly framed within relevant models such as Lombardo and Eichinger's (1996) 70/20/10 model for learning and development which means: 70% of learning should be experiential learning, 20% of learning should be exposure through social learning and 10% of learning through education as formal learning. This learning model enabled rebirth to be more interactive and experiential learning rather than the traditional focus on technical training (Lombardo & Eichinger 1996).

This created a platform for holistic learning engaging the whole being, unlocking creative thinking and energy for innovation. This subsequently led to Private Wealth Client-Servicing becoming a hub for growing future skills to retain within the greater business, growing engagement levels, growing communal bonds and strengthening relationships both with internal and external stakeholders. As a result, this BU created an environment which nurtured and enhanced learning, creating hot-spots for

learning using, for example, places like coffee spots, award evenings, the Xhosa room which was a traditional wealth bank boardroom turned into a rebirth incubator, and designed in a way that nurtured creative thinking, learning and play. The use of technology within this environment became a creative tool for facilitating a space for interactive fun learning breaking traditional methods, and incorporating agility and innovation to capture attention and increase engagement.

### **8.4.3 Innovations: Pre-and Post**

In terms of the experience of learning within this environment, the below captures the CoP voices:

Due to the growing culture of learning, a space for creative risk-taking was opened which empowered this BU to unlock its full potential through becoming custodians of bringing about solutions in areas where this BU faced challenges. Increasingly, employees within this BU assumed an entrepreneurial posture and drove the culture of innovation, becoming agile and nimble to navigate change strengthening and embedding the learning and objectives driven through the rebirth transformation journey and gradually becoming anti-fragile and increasing reputational capital. This grew the value proposition of this BU within the greater business and with external clients, strengthening the servicing pathos of this BU embedded in its ethos of: I Care, I Can, I Commit and attracting greater investment and resourcing from the greater business. As a result, innovations in this BU grew covering, and reflected an integrated approach within the strategic pillars of: technology, people and efficiencies; the results of which are discussed in the chapter on results and findings.

The community experiences the process of innovation as energising and highly creative which brought purpose and meaning within this otherwise regulated environment. Innovations like rebirth challenged the communities around their mind-set and thinking patterns as well as an engendered spirit of organisational learning which increased the drive for knowledge within the communities. The below comments capture the CoP experience around the process of innovation.

Neil, an innovator in his own right said, “it is interesting to see how our ideas come to life; as we brainstorm, new aspects are explored and analysed.” Lauren, as a team leader and CoP reconnoitre stated, “speaking from my CoPs perspective it was comforting to know and find out that we all shared views and had similar innovations, but also the conflicting innovations and being able to accept scrutiny and move on.” Furthermore, Rudi felt, “that no matter how overwhelmed you are, and feel that you can’t do it, you always can. You just need to re-calibrate and find new energy from the community.” While a community elder, Lynton expressed that, “rebirth and innovation are two co-habiting processes that significantly support each other” and went on further to say, “the mysterious veil surrounding innovation has been lifted. I used to think that it was a major event that came from somewhere external and that innovation was a somewhat difficult space to enter into.”

### **8.4.4 People**

Whereas pre-rebirth, Wealth Client-Servicing was challenged with high turnover, this changed during rebirth as people became attracted and invested in this BU, seeing it as a hub for growth and innovation to showcase broader talent and competence. The talent that emerged from out of this BU because of immersing in the rebirth transformation journey became the first of its kind; attracting opportunities in areas where it would previously not be considered to move into within the greater business.

FNB Private Wealth Client-Servicing learned to leverage the gift of diversity in a unique way, appreciating and growing in its understanding of this value holistically. This created opportunity as old and new consultants unlocked innovative ways of working and collaborating in an inclusive manner thereby creating an environment which consciously engendered trust and growing a strong work ethic. The ethos: I Care (Heart); I Can (Head); I Commit (Hands) became living theory and a quantifiable, measurable competence which tangibly informed the culture into which all new recruits came, and later became part of the design of the induction programme.

People in FNB Private Wealth Client-Servicing stood out from the rest of the business as immersion in the rebirth transformation journey created a unique norm in behaviour. This platform was strategically used to strengthen internal partnerships with all other business areas with which they interfaced resulting in processes and products which directly spoke to client need and moving away from operating as traditional bank to becoming an innovative platform providing an unparalleled client experience. People in this BU therefore became an asset to driving FNB's 2025 innovation strategy. The following represent CoP voices within the frame of people:

The CoP voices in terms of grounding to the South and connecting to their humanness and being by reflecting on their eight human aspects with focus on the understanding of their emotions and how they feel will now be heard. Reflecting on emotions was an important part of the rebirth journey as rebirth centres on embracing and acknowledges the value of our humanness. In relation to the question of how people were feeling, the CoP contributed and shared various stories regarding their feelings indicating a greater awareness regarding self, other, community and the environment. Words such as, "I was see-sawing between excitement and exhaustion" were uttered by Rudi, "I am feeling concerned not only about the CoP but in general." Lebogang said, "I am back and feeling strong enough to take this task on." Palesa said, "I am feeling concerned whether we will finish the required work by the deadline." Viloshni exclaimed, "I am excited and proud of my community as well as impatient how our innovations could come to life." Lynton said, "I am feeling positively challenged" and further stated, "I often feel like I'm short of being caught up in chaos because I don't know which matter to focus on first as everything seems equally urgent." Malcolm exclaimed, "I am enthusiastic and confident and excited about what the future of our journey holds in store!"

In terms of their emotions, the community acknowledged the importance of understanding how to work with their emotions in relation to managing the change that this BU was going through and understanding how to translate that within the context of their normal work and the work within the rebirth transformation journey. The community appreciated the value of existing and co-existing within a CoP, and saw the value of this people form and how it aligned with the Southern norm and African philosophy of *Botho-Ubuntu*. Rudi expressed the following regarding *Botho-Ubuntu*, "the unity and togetherness of the community embodies is what really captures me. I love being part of a team or being part of building a team, the community has given me this opportunity." To Malcolm it meant, "a means of work for a greater cause as opposed to only working for people again. *Ubuntu!* The community helps each other to bring rebirth and innovation forward." Lynton stated that, "it is there as a source of empowering each other and other people as well." Viloshni felt that, "it is a lovely feeling to be able to call the community together in times of challenge and as demonstrated also in times of celebration, the community is able to be there for each other and the community provides a support structure." Thuli admitted, "I was not about the community and joining or participating, but I soon found that we are all there for each other." Neil said, "there is a saying that hands wash each other,

and I can say that I have felt this in the community. I am starting to see the forming of this and the power that comes with it is mouth-watering and how we hold this going forward is going to be critical.”

In capturing both the experience of the rebirth transformation journey and being in community within a CoP, there was an overwhelming sense of service which had developed within the CoPs. While in part the new work ethic these CoPs had to inculcate to integrate the level of change occurring within this BU they expressed a need to give back and the following capture their expressed wishes on what they wish to give. Gethan summed it up by saying, “the knowledge of the CoP and people jokingly referring to them as the police was incredible. I gave people insight and extended my hand to pull them up into our journey if they allowed me to. I offered to give support, encouragement, happiness and even more, ears to listen. I honestly enjoy my mentorship role as this is the best way I feel I can give back. I would like to give positivity and a persevering spirit; energy and a platform for our new community to be heard and to show what we are made of.”

#### **8.4.5 Leadership**

Prior to Wealth Client-Servicing embarking on the rebirth transformation journey, one of the greatest challenges facing this BU was the lack of strategic leadership. The notion of leadership was a loosely used word which practically translated did not exist. There was no clear understanding of what leadership and its related attributes consisted of with focus on technical management based on the number of years in the BU with a high focus on transactional management that could not enable new or existing talent to thrive.

Through the rebirth transformation journey, leadership was empowered to understand its role in driving strategy, technology, people and systems through an unobstructed vision crafted together. The vision created a compelling reason for this leadership to desire to learn innovative ways of leading and to become open to engage new leadership thinking creating a shift from transactional to transformational being and becoming. In this way, leadership was driven to pro-actively manage its learning path, be encouraged to tap into existing talent within the servicing team to leverage strengths, release the need to micro- manage and empower people within the team to showcase their varying strengths.

Leadership also grew in confidence to be willing and open to feedback, appreciating this as information which could be used pro-actively to drive visible change and be the custodians and role models for change (Wilber, 2000). Setting healthy boundaries became an appreciated norm which previously did not exist as leadership were not always open to creating what they perceived as possible conflict with people they were friends with. The appreciation of managing conflict through consultative and constructive methods such as coaching grew and reframing the dynamic of relationship became the key.

Within the rebirth transformation journey leadership is organic, and does not follow the traditional patriarchal structures within this context therefore leadership integrates all four inner and outer worlds of being, becoming, knowing and doing (Lessem & Schieffer, 2010). It begins within “I”, evolves to “We” and “Us” integrating, “I Care, I Can, and I Commit.” This enables one to own and hold his or her own leadership and display this process in his or her community as well as the community at large (FNB and FirstRand). The following represent the voices of the CoP in terms of leadership:

Lynton said, “I feel that I have indeed grown in my capacity to handle multiple things and I have gotten immense respect for people who hold many roles. I admire Gethan in keeping everything together and it gives me something to strive for.” Shannon stated, “I have been getting frustrated with having to fight to balance both rebirth responsibilities as well as work and then also having to keep everyone together for the CoP groups. I’m holding the opportunity and challenge to expand this to the greater FNB and FirstRand. I would like to take it forward and show our return on investment.” Adjoa expressed the following, “I appreciate the push we get, even though I tend to react in a negative way to being put on the spot. However, I’m learning to use the experience and fuel myself further to be my best.”

#### **8.4.6 Levels of Engagement**

Within the rebirth period, turnover decreased, and employee engagement increased. More importantly, it was evident in the observation of this BU that a cultural shift was happening which created a compelling reason for being and commitment to drive this brand value increased. The original perception of this BU being given a prison metaphor of “doing time” gradually changed to this BU becoming the innovation hub for the greater business and a talent incubator from which the business talent attraction and retention strategy could be realised. The philosophy of “I Care, I Can, I Commit”, became living theory which was translated practically into daily performance deliverables that could be measured and rewarded. This drove elevated levels of engagement as people felt increasingly empowered to engage in open innovation without fear of perceived risk as support grew stronger for this BU throughout Premium Wealth. The following represent the CoP voices demonstrating their perceptions on engagement:

Neil happily said, “attitude has been the most significant shift I have seen. People see the success of others involvement and want to be a part of the journey.” Lynton reflected and said, “when I started working here in December 2012, I was not quite sure why I was here and what my purpose was. Ever since embarking on the rebirth transformation journey I am slowly discovering my purpose. I have seen improvement where people are becoming more adaptable and changing their way of thinking and envisioning what benefits they will have by doing so.” Lauren said, “I have seen huge growth which brings about challenges; I think the “newbies” need to be brought up to speed with the views we have already been through. There is so much of progress that people have actually embraced the journey and want to be involved.” Rudi said, “leaders have opened honest conversations with each other. The environment is now buzzing with activity and people see the value in what they do, they feel appreciated and therefore contribute more of themselves and their time.”

#### **8.4.7 Customer Engagement**

Customer engagement strengthened and increased because of the BU’s understanding of its mandate and reason for existence within the greater business, and how this directly correlates with long-term sustainability of this BU. The “Care, Can, Commit” philosophy became a culture that could immediately be picked up by clients despite no visible contact creating an unparalleled client experience and strengthening reputational capital. This created increased demand and dependency on this unit both from internal and external customers resulting in both the private banker community and the external clients building stronger relationships, and turning this into a service suite of business excellence. This resulted in the BU being in a position where it could drive innovation sessions bringing together internal and external clients and bridging the long-standing divide of “us and them”, creating a stronger community grounded by a common identity and business mandate, and thereby leading

competitive strategies in the market and increasing client loyalty. The following represent CoP voices in terms of customer engagement:

Hloni, feeling concerned said, “I think it needs to be understood by everyone in the suite before customers are brought on board.” Malcolm believes that, “customers will become an integral part of the process once rebirth is a way of life in the suite. By receiving feedback from customers through OSTY ratings/complaints, we can use the information they have given to improve on.” Palesa said, “currently I’m not aware of customers being involved in the innovation process.” Lebogang stated, “the innovation sessions have an effect as I always drive for first call resolution in instances where a lot of my colleagues’ resort to connecting clients through to other departments.” “Customer engagement has been much more interesting as during the journey we were taught about different sides of the brain which makes interaction with customers more interesting,” said Thuli. Lauren said, “customer engagement has resulted in our business partners showing interest in our BU and even wanting to partner with us in the rebirth journey. We are moving away from the call-centre environment adding immeasurable value to the client. I feel that the client trusts us more as the consultants are becoming more capable.”

#### **8.5 Reflections on rebirth and its impact**

In closing the CoPs had the following to share regarding their experience of rebirth: Lynton stated, “the journey has brought a lot of positive challenges, a lot of challenging work and dedication as well as focus.” Neil expressed, “it is interesting for me to see how I have cracked open my shell and revealed my real self. This has been a new chance and a new beginning.” Hloni said, “there has been a lot of positive growth and as the journey continues, there are spouts of confidence and spouts of lack of confidence. However, it is great to see that there is now more confidence.” Palesa said, “there is so much more that I can and still need to learn, it’s amazing.” Lauren stated, “in the rebirth I’m of the opinion I’m carrying the broom throughout my journey. I say this because if anything, I have been sweeping away unhealthy habits and acknowledging new perspectives and mind-sets.” Gethan said, “The magnitude of what lies ahead if we get this right brings with it excitement and energy but also fear of failure or fear of positioning the Private Wealth Service Suite voice appropriately.” Malcolm said, “rebirth forms the foundation in terms of opening the mind and embedding the much-needed culture shift to service and innovation. It connects change and innovative thought very effectively.”

Figure 8.1 below depicts the CoP at a closing of the tribal circle ceremony held in 2014 in the office park of FNB Private Wealth-Client Servicing.



**Figure 8.1:** rebirth closing of the tribal circle (picture captured by the researcher, 2014)

As depicted in Figure 8.1 above, the following was stated by the CoPs: Lebogang said, “I feel renewed and able to see things differently. I’m able to remind the people around me and hold them accountable for what they say.” Palesa said, “I have gained self-belief and determination to persevere through all hardships.” Neil said, “overall it has been a valuable experience, and my comfort zone has certainly been stretched. I can see the value in the process which has had in-office and personal effect.” Lynton said, “I have to emphasise what has been the core message I have received from rebirth; if you do not allow your heart or soul to drive what you are seeking; you will not have the strength to endure the journey.” Langa stated, “It feels like months ago that we had our break-away and that is scary, so much has happened in such a short space of time.” Rudi said, “time and tide wait for no man-no matter what is going on in your life, time keeps going and we need to respect time and note that the show must go on.” Shannon added, time is a very scarce commodity that we are running out of, therefore always work carefully (don’t waste) and effectively make a difference to deliver value in time.” Viloshni said, “I like to think that I have only realised a tip of the iceberg and I can’t wait to see where it takes me and what unfolds.”

## **8.6 Conclusion**

In this chapter, through the collective voices-triangulative research findings from interviews conducted within the rebirth transformation journey, it is evident that all people on the floor should get the opportunity to go through the rebirth transformation journey. Chapter 9 shares the results, findings and recommendations of deploying the rebirth transformation journey within Private Wealth Client-Servicing and illustrate the impact of this rebirth transformation journey and return on innovation (RoI) which this BU experienced.

## **CHAPTER 9: Results, findings and recommendations – FNB Private Wealth Client-Servicing vision to rebirth and client-servicing philosophy**

*We can only understand our world as a whole if we are part of it; as soon as we attempt to stand outside, we divide and separate. In contrast, making whole necessarily implies participation: the individual is restored to a circle or community and the human to the context of the wider natural world.*

-Reason (1994: 10)

*“I Care, I Can, I Commit”*

FNB Private Wealth Client-Servicing Vision and Philosophy (2012)

### **9.1 Introduction**

Chapter 9 presents the research results, findings and recommendations into which I delved, the research questions and objectives this research aimed at answering and achieving within the case organisation as presented in this thesis. In Chapter 4 I presented the story of FNB Private Wealth Client-Servicing being the case organisation within which this research has taken place. Further, I presented the story of the CoPs, research methodology, methods and rebirth as transformation journey and how it is applied, and the individual and collective voices as presented in Chapters 5, 6, 7 and 8 respectively. These results, findings and recommendations present the evidence and outcomes of deploying the rebirth transformation journey to transform this BU, and move it not only towards good to great (Collins, 2001), but also to living its newly defined vision encapsulated in the philosophy crafted with the servicing team being: “I Care (Heart); I Can (Head); I Commit (Hands).”

Results, findings and recommendations presented herein will follow the integral approach applied within the thesis and how PAR as integral, qualitative methodology towards social innovation through CoPs was applied. It is through PAR that I was able to engage my total self and the CoPs with a view to transform FNB Private Wealth Client-Servicing. As presented in Chapter 6 of this thesis, I detailed the data-gathering methods used and how the data was analysed and data quality ensured. It is from this data that I present my research results, findings and recommendations. These results, findings and recommendations represent the outcome and impact of deploying the rebirth transformation journey within this BU, and they are living theory of the transformational shift which occurred within FNB Private Wealth Client-Servicing. Within these results, findings and recommendations are also recommendations for FNB Private Wealth Client-Servicing. In this chapter, results, findings and recommendations of the application of the rebirth transformation journey are validated, and outcomes thereof are integrated through the pillars of technology, innovation, people and systems.

The purpose for this thesis is to effect the value proposition of engaging the Southern construct of *Botho-Ubuntu* and collaborative, communal humanness as relevant transformation for locating identity and grounding to Call. In engaging this frame, self, other, community and the larger world are enabled to transform inclusively as in engaging South and the integration of the inner and outer four world paths may be realised. The South reconnects us to our humanness and the importance of identity in community; propelling a re-engagement whole sensing, whole being acknowledging the gift of reconnecting to indigenous (inner) being to effect holistic exogenous (external) becoming. The South also brings the gift of aligning the four worlds of man, spirit, nature and enterprise, and presents a valuable proposition towards addressing the prevalent lack of transformation in current

transformational methods mostly borrowed from North-Western thinking. For FNB Private Wealth Client-Servicing and the CoPs to re-discover their collective and individual identity rebirth became the solution I proposed and facilitated using PAR for this BU to transform inclusively, catalysing social innovation (Rushesha, 2015).

## **9.2 Community of practice**

The community of practice (CoP) within FNB Private Wealth Client-Servicing embodies the ability to learn, collaborate and provide an essential platform that fosters learning and collaboration across the organisation. The rebirth CoPs function as strategic assets which enable FNB Private Wealth Client-Servicing to meet its challenges presented through 2025 set objectives. The rebirth transformation journey was facilitated through CoPs, and promoted dialogue and voicing to build individual and collective identity to reconstruct relevant narratives and burning platforms within the case organisation. Reflection in knowledge practice was an essential ingredient of knowledge management activities as reflexivity searched for new innovative solutions. Perpetual challenging of CoPs maintains the dialectic tension among knowledge workers and rebirth becomes an important platform to introduce the 2025 mandate.

## **9.3 PAR**

In Chapter 6, I described PAR as a qualitative research method applied within this thesis. PAR as described by Matupire (2014) involves embracing the principle of integral leadership, working with individuals, groups and organisations bringing together multiple perspectives that instil effective leadership at all levels of an organisation. Furthermore, PAR encourages effective communal engagements in the South towards aligning the four worlds resulting in integral transformation (Lessem & Schieffer, 2009). Within the FNB case PAR was deployed to realise the value of inclusive transformation through CoPs as presented in Chapter 7 where the rebirth transformation journey application was discussed.

The application of PAR enables the researcher to gather data while also influencing research practice positively (Meyer, 2000). I therefore gathered data in two stages namely, pre-intervention investigation (pre-rebirth) and pre-post intervention analysis (during and post rebirth). Within the pre-intervention investigation stage, I used the following data-gathering methods: auto-ethnography (oral history and personal experience) wherein I told my story, grounding to Call in authentic identity which I conceptualised as Rebirth, as presented in Chapter 2. The story of my culture towards communal Call emerged, as presented in Chapter 3, and the story of FNB Private Wealth Client-Servicing presented in Chapters 4 wherein I was called in to cause transformation within organisational ecology. This is where I proposed and implemented the rebirth transformation journey as a transformational tool towards social innovation.

Within the pre-post intervention analysis stage, I conducted listening surveys and facilitated community engagements through focus group discussions (FGDs), in-depth interviews (IDI), participative observation and CoPs collective voices, key informants, community engagement surveys during and post rebirth based on varying set questionnaires, journaling, notes and archetypes as critical methods through which I could gather more meaningful data. Critical to this study, these

methods enabled me to inquire, investigate, intervene and analyse deeply the effects of rebirth and its experience from my being a participant and researcher perspective and that of the CoPs and FNB Private Wealth Client-Servicing at large.

It is through PAR that dialogue and voicing enabled the case organisation to listen to multiple voices from CoPs in order to distil meta-insights therein. PAR is thus a foundational basis from which identity is located as fertile womb for inclusivity, catalysing social innovation. Below, I will discuss the key and supporting themes that emerged from the above-mentioned data-gathering methods.

#### **9.4 Key themes that emerged from data gathered in the rebirth transformation journey**

The research methodology endeavours to identify the areas and themes where innovation takes place, proposing models based on PAR facilitated through the rebirth transformation journey which FNB Private Wealth Client-Servicing embarked on to offer appropriate responses for this BU to improve and strengthen the contexts and platforms to find strategic expression (Lessem et al., 2014). This thesis deploys an integral approach which builds on living theory, grounded theory and qualitative triangulation that converge with epistemology (Burke, 2005). This multiple research design endeavours to translate the wider meta-data into local narratives in a case study within FNB Private Wealth Client-Servicing (Bryman, 2008).

Within this research I identified five themes being; Theme 1 which explores learning experiences and questions whether a new rebirth as a PAR method and curriculum can emerge to advance the 2025 future vision. Theme 2 examines whether rebirth could migrate from linear to an appreciation of complex frameworks to achieve the 2025 FNB Private Wealth Client-Servicing vision while Theme 3 pertains to the FNB Private Wealth Client-Servicing culture and climate for rebirth susceptibility and the enablement of enhanced innovative solutions through communities of practice. Theme 4 explores the required characteristics of rebirth towards eco-centric innovation and future sustainability, and Theme 5 examines the emergence of new perspectives for the rebirth transformation journey (Lessem et al., 2014). These themes emerged from the data gathered from the above-mentioned data-gathering methods used during the pre-post intervention analysis stage. These data-gathering methods revealed recurring themes which represented burning platforms for FNB Private Wealth Client-Servicing. Below I will briefly outline the supporting themes from the data gathered in the rebirth transformation journey.

#### **9.5 Supporting themes that emerged from data gathered in the rebirth transformation journey**

I identified supporting themes specifically through community engagement surveys conducted within the FNB Private Wealth Client-Servicing community. As discussed in Figure 6.1, I used community engagement survey as one of the data-gathering methods within my pre-post intervention analysis. The themes that emerged were client engagement, support, trust, processes, sustainability, training, collaboration and knowledge-sharing. These themes pointed to the original challenges identified and presented as the burning issues in the story of FNB and became the platform within which the rebirth transformation journey could facilitate greater engagement through the CoPs resulting in sustainable change. The results captured in this chapter demonstrate the impact of deploying the rebirth transformation journey to influence inclusivity resulting in social innovation of the CoPs in this BU.

Within the context of client engagement, we refer both to internal and external clients. Client engagement seems to be one of the biggest untapped resources in the innovation pipeline. Clients are not involved in innovations in any way shape or form. This themes' trend continued throughout the FGDs. Internally the general feeling is that rebirth is not communicated in a satisfactory manner. The lack of correct communication plays a major part in the perception of rebirth. It has been labelled secretive and exclusive. This has the potential to erode the goals of rebirth right at its foundations.

Support within the context of Private Wealth Client Servicing and the rebirth transformation journey must be seen in a broader light than just team leaders, it refers to the support required to bring innovations through the entire process while carrying the cultural expectations facilitated through the rebirth transformation journey. The existent opinion from service consultants is that once the idea is logged, it is recorded and nothing gets done about it further. No direction is given on the way forward from a management perspective and there is a general lack of accountability inhibiting the opportunity to collaborate.

Trust seems to be one of the more promotional aspects that have come out of the rebirth culture with the result being colleagues within the FNB Private Wealth Client-Servicing having a feeling of mutual trust between each other, and while there are various levels of trust, overall trust has emerged as one of the more stable themes discussed.

The processes within the bank are perceived as rigid as with any financial institution. The numbers of people within Private Wealth Client Servicing perceive rigidity within processes as limiting the creativity needed to be innovative. This stifles the capacity of this business impacting creative capability within FNB Private Wealth Client-Servicing and thereby creates a barrier towards integral innovation. The majority of the CoPs feel that it is these processes' rigidity that limits the creativity needed to be innovative.

Sustainability links to a statement made by FNB CEO, Cilliers (2014) in his 2025 vision where he calls for "sortedoutness" to enable focus on the future. This statement carries more relevancy than most people realise. Take for example the system within Private Wealth Client Servicing which has more than 10 systems that have overlapping roles which, on an organisational level, is probably one of the most evident bottlenecks. A new system gets brought in regularly to improve on the previous one, the "database" of systems just keep expanding. The point that the systems example illustrates is patch solutions, they help fix an immediate problem but are not sustainable. On a strategic level, a point raised by a team leader is that the company centralises roles only to decentralise them later again, not only does this cause friction with employees involved, but it also hinders the business unit and teams from moving forward.

The final burning platform that has emerged is training. In terms of learning and development, there is a perception that training offered is brief and does not cover the subject matter in depth. Equally there are people who feel opportunities are available and are satisfied that it is left up to individuals to pursue at their own discretion. The abovementioned focus areas should not be viewed as negative but rather burning platforms which if addressed can become a strength of the process as the below focus areas have become. Within FNB Private Wealth Client-Servicing, the overall culture has developed strong components of collaboration, trust and knowledge-sharing as a result of deploying the rebirth transformation journey which is facilitating a shift within this BU.

FNB Private Wealth Client-Servicing consultants generally feel they can source the help they need from anyone due to growing engagement in knowledge-sharing and an increase in becoming a learning organisation (Lessem & Schieffer, 2009). These consultants feel that with opportunities afforded to them through the rebirth transformation journey an interest greater than a bottom line is taken in them. This is further endorsed by the FNB Private Wealth Client-Servicing environment being perceived as growing in becoming human, personal and communal. A substantial number of people feel there is an effective team-work factor including team leaders which play an important part in the general happiness of the Service Suite as a result of the influence of CoPs. FNB Private Wealth Client Servicing has progressed a long way from where the rebirth journey started.

The above-mentioned themes should not be viewed as negative, but rather as opportunities which if addressed can become strength. All six supporting themes mentioned above go hand in hand and highlight the issue of lack of communication to embed rebirth and facilitate inclusive and integral buy-in. The FNB Private Wealth Client-Servicing overall culture has strong components influencing supporting themes of collaboration and knowledge-sharing. Within these themes, consultants generally feel they are able to source the help they need from anyone. They do feel that with the opportunities afforded to them through rebirth, the organisation is demonstrating an interest in a purpose greater than the bottom-line which embeds value in humanness. Most consultants within FNB Private Wealth Client-Servicing feel there is a great team-work factor which includes the servicing culture of team leaders positively influencing the well-being of the BU.

## **9.6 Post-intervention analysis**

### **9.6.1 The process of post-intervention investigation**

The post-intervention investigation was used to examine the impact of rebirth as organisational transformation journey towards inclusive transformation, catalysing social innovation. I conducted this investigation by focussing on the grand narrative from feedback sessions conducted whilst making reference to the themes identified within the case organisation during rebirth. The successes of the interventions are studied and examined by identifying trends in staff retention (morale), logged and implemented innovations, trends in engagement surveys and trends in client service delivery.

Knowledge management practices in FNB Private Wealth Client-Servicing could utilise innovation, creativity, and its strategic application to stimulate inclusivity through rebirth as a tactical imperative for delivering its future 2025 vision successfully. A new profile for future leadership is required in FNB Premium Client Servicing, as leaders have realised that knowledge workers are essential to transcend the divide between the traditional and the new knowledge rationality amidst the complexity to develop the rebirth transformation journey as intangible knowledge capital for achieving the 2025 vision.

Successful companies in future decades will be those that provide their human capital with integral innovation facilities to compete proactively. The challenge now in FNB Premium Client Servicing is the achievement of exponential knowledge productivity, which resides in the cognitive capabilities of knowledge workers. There is a growing awareness in FNB Private Wealth Client-Servicing that knowledge productivity is linked to creativity and innovation for the establishment of a strategic sustainable competitive advantage. This awareness further illustrates that knowledge competency

can be directly linked to the case organisation's ability to learn through the acquisition of new knowledge.

The future competitive advantage could be vested within knowledge leadership, within the collective, the activation of creative strategic vectors, towards achieving success in the knowledge economy. Rebirth endeavours to build the future value proposition for the utilisation of creativity and integral innovation through group collaboration, to produce new client relationship combinations as future strategic drivers. This thesis endeavours to explore the significance of rebirth within FNB Private Wealth Client-Servicing concomitance as the pivotal point for integrative knowledge enablement collaboration to finally recommend a future REBIRTH to assist and support creative leadership as participants who are essentially the owners of this process in other organisations.

The core argument in this thesis is to engage and explore new theory towards understanding rebirth within the frame of strategic management. The rebirth transformation journey endeavours to link leadership and management's ability to leverage the creation of new knowledge, imagination and novel practices as it responds to uncertainties in achieving the future vision of FNB Private Wealth Client-Servicing. The essential issue in managerial and organisational theorising could be leadership's failure to release the potential energy of creativity and the subsequent rebirth as a transformation journey in the pursuit of competitiveness.

### **9.6.2 Analysis of approach through rebirth**

Rebirth transformation journey seems to be a complex and complicated topic (Kurtz & Snowden, 2003). This complexity is more underlined when one considers that the surveys conducted were almost exclusively completed by people directly involved in the rebirth transformation journey. The preliminary analysis of the feedback is laden with paradox; at a first glance, it would almost appear inconsistent. It is difficult to determine root cause in either direction (promotional or non-promotional) as the foundation of rebirth is based on identity and a sense of greater purpose, rather than clearly defined unit of measure. The emerging realities have confirmed the complexity of what is trying to be achieved which is laden with paradox.

The paradoxical clashes are evidence of two cultures wrestling against each other within FNB Private Wealth Client-Servicing. A tier discussion regarding the complexity of the contradicting goals and disharmony regarding leaders, team leaders and consultants within this BU needs to be engaged with largely as this could be the paramount barrier for preventing inclusive transformation within the rebirth transformation journey. It has emerged that a shared understanding and a deeper sense of working in unity are required towards achieving strategic goals as a formal community with a shared vision is essential for the rebirth transformation journey to become imbibed within the mind-sets of the community.

### **9.6.3 Increase in staff retention and morale**

A key component of what the rebirth transformation journey delivered was that it got people to understand that their development was solely dependent on their commitment and efforts, and was not something to be granted, bestowed or owed to them, thereby creating a culture of commitment to continuous learning not limited to classroom or technical learning only. Most of the new consultants coming into the FNB Private Wealth Client-Servicing were already academically qualified, but had very little work experience. This created an effective mix and good motivation across everyone and instead of people falling back into the old culture defined by lack of acquiring knowledge. What transpired

was that the consultants who served the longest in this BU were self-driven to begin or continue with their studies which caused them to become great role models to newer consultants in terms of daily operations, systems, values and the general working environment and expectations, and they became catalysts for knowledge-sharing born from years of experiencing and investigating ways to bring about solutions to issues within the environment inhibiting the ability to transform and innovate. The new consultants in turn looked up to them and learned from their experience, merging their qualifications with practical experience, and moved quickly to being part of a team that mobilised together to deliver a top end client centric service model, thereby increasing the value proposition and living the new philosophy of: “I Care, I Can, I Commit.”

Rebirth was also able to break down the people barriers for FNB Private Wealth Client-Servicing within the greater FNB. Previously an area where the skill was considered one-dimensional, of an administrative level only, not fully entrusted with client interactions and relationships, with no investment in technology, systems or people. Now it became an area where experienced consultants supported the inexperienced while the highly-qualified young graduates shared and challenged the older and more experienced consultants. Learning between consultants became energised and while the older consultants could rather have held onto their knowledge in fear of no longer being relevant to the business, they didn't. Instead they quickly bought into the rebirth transformation journey, because it resonated with their humanness, something that had been missing before, and they became the leaders within the work environment.

New, young graduates with many more qualifications than them would look up, trust and respect the older consultants. They would also ultimately inspire them and many of the older consultants then started to study in earnest and improve upon their qualifications. It became an exciting time of knowledge-sharing, knowledge sourcing; knowledge aspiring and knowledge development. This was very much required for the new knowledge economy. From this it emerged that rebirth gave consultants who were willing, quick and great exposure to the greater FNB Wealth business and indeed the greater FNB business. As a result, they could learn faster than any recruit to the business would have learned and it greatly enhanced their skills, often in line with their own career development goals as it facilitated a bridging process between aligning purpose to the traditional job description.

Rebirth as a transformational journey could entrench a great culture of belonging and learning for consultants. Essentially up until rebirth, a consultant in FNB Private Wealth Client-Servicing was only considered in alternate roles that were administrative by nature, with the result that most consultants that left the Suite to take up other roles in FNB would be moving to an operational administrative area elsewhere in the bank. As a result, the number of staff leaving FNB Private Wealth Client-Servicing to jobs outside of FNB was high. It could have been argued at the time that this was an industry norm and that the prominent level of churn for a call centre was to be expected.

Once again rebirth brought about a change to this accepted business norm. It is through rebirth that consultants got to understand the value of a team and others as a community and working for the good of others (*Botho-Ubuntu*). They got to cherish this and they got to understand that opportunity within FNB was abundant and welcomed and would serve their career development goals well. Consultants therefore worked harder and bought into the FNB vision and culture quickly, which

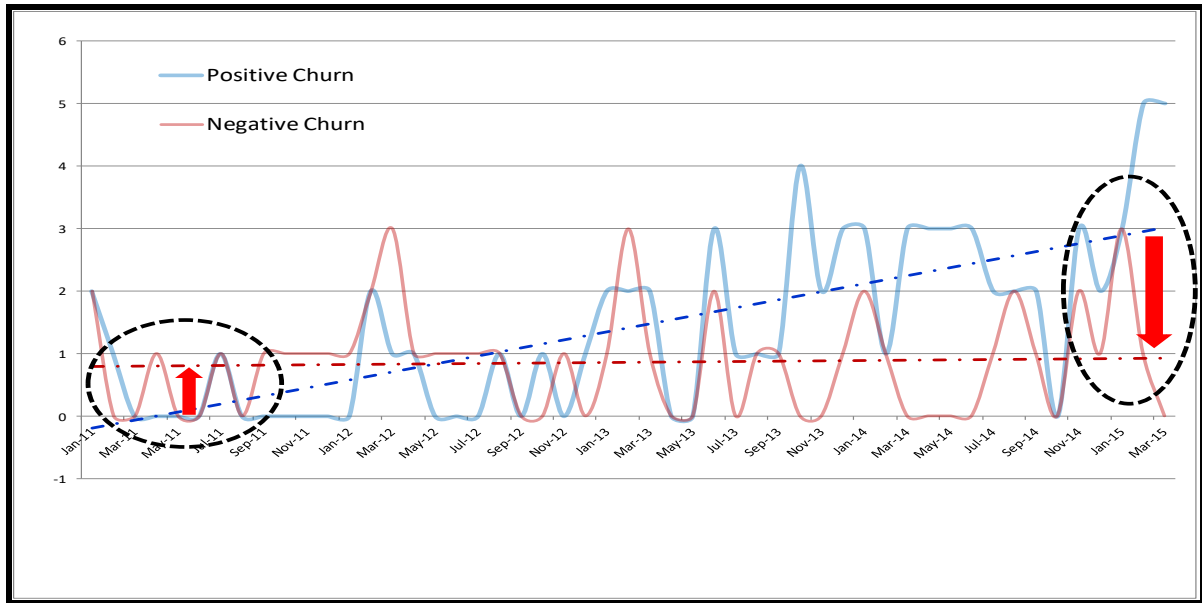
ultimately put them in good form to advance to roles they were eager for and to remain within the FNB fold. What is also interesting is that they have automatically taken that same learning from rebirth into their new roles and even from there have developed further and stood out from the rest.

Focus groups met on a continuous basis to share information about the journey and to apply an assessment of the feedback, which myself and the rest of the rebirth team would be a part of. There were essentially two focus groups which would meet every two weeks and would cover topics and share feedback on knowledge gained, development objectives, embedding the change projects, managing to conduct research to conduct further implementation or enhancement and so through all this a development of self for everyone in the focus groups would transpire. As a result, within the period 2015-2016, many consultants have moved onto the following roles in FNB Wealth; Finance Administrator, Business Analyst, Risk Consultant to Risk Manager, Risk Administrator, Client Service Consultant to Client Service Manager, Marketing Assistant, Private Banker Analyst to Private Banker, Investment Desk Analyst and Quality Assurance Analyst.

The key here is that while the churn for the department remained high, this churn had been shifted from external to internal, which served as a further enabler to the business. Again, this also added to the perception change from the business, whereas previously the business did not consider the value of the area to be very high and associated it and its people predominantly with administrative functions. Figure 9.1 below depicts that perception had shifted tremendously, the practice had shifted to leaders out of the business coming and asking for Consultants to move into their areas at various levels, simply because they had seen the value of these “new Consultants” in action and the eagerness continued to grow, until eventually there had to be rules put in place to manage how quickly and how often these internal transfers could be made.

#### **9.6.4 People Churn (Staff Turnover)**

Pre-rebirth as well as the earlier part of rebirth, there was a high degree of staff churn taking place in the old RMB Private Bank Service Centre (before becoming and fully transforming into the Service Suite) and in most instances consultants were lost to external churn as opposed to developing and growing within the organisation. Figure 9.1 below illustrates how rebirth influenced this negative churn into being more positive within FNB Private Wealth Client Servicing.



**Figure 9.1:** Staff movement Jan 2011 - Mar 2015 (Business Unit HR Reporting)

Due to deploying the rebirth transformation journey, Figure 9.1 above illustrates how this churn could be turned around substantially within FNB Private Wealth Client-Servicing so that external churn eventually became very low and internal churn although quite high showed illustrious career progression and development for consultants into other areas within FNB. It was the strategic focus of FNB Private Wealth Client-Servicing to retain these resources within the Group and to turn FNB Private Wealth Client-Servicing into a hub for growing skills which could be moved into the specialist parts of the business.

Essentially before rebirth, the level of losses and disciplinary hearings were high. Often these were justified as being so because of the nature of work or nature of the employees, or roles. However, as rebirth progressed within FNB Private Wealth Client-Servicing these numbers started to show a massive impact in the right direction. In fact, ever since, the number and value of operational losses have been very low, sometimes the lowest in the entire Wealth business and the number of disciplinary hearings has also reduced substantially and has been replaced with more career progression opportunities and discussions. Rebirth played a key role in setting this up and enabling this stability in staff turnover as such and played a key role in getting people to understand and respect each other's differences, which in turn allowed a new respect for the work environment and a new ability to work together.

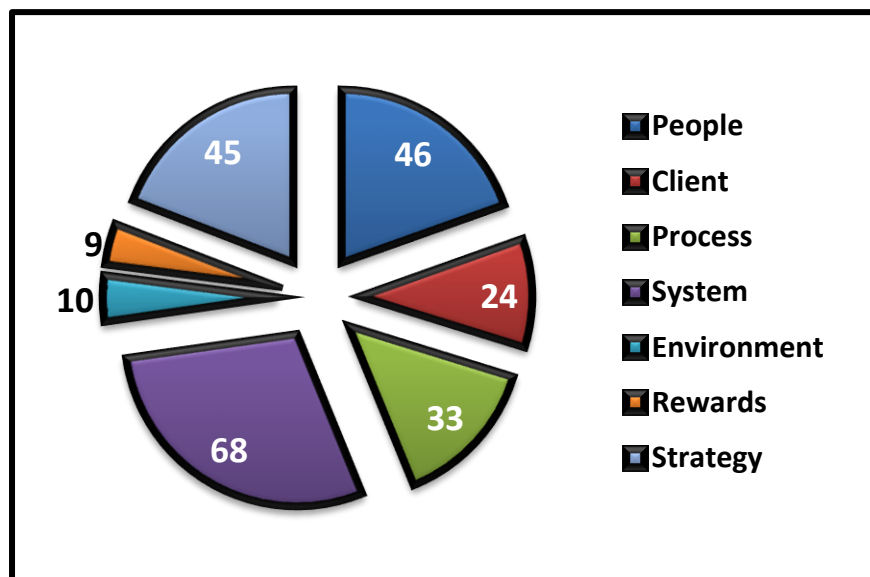
This in turn resulted in almost all consultants who went through the rebirth transformation journey in full, standing out and being easily identifiable and taken up into other environments within the greater FNB business. The roles they moved into ranged from Private Banker Assistants, to Business Analysts, Risk Analysts, and Finance Administrators. Subsequently some of these people have even moved on further into management and private banker roles. It is thus evident that a benefit was achieved when one took the time to look around the business and see people sitting at all corners, people who were part of the journey, people who have felt its effects, people who now continued to apply the principles learned in the process in their corporate as well as their private lives and as a result continued to enjoy

remarkable success in their new roles and their new business environments, under different business leadership.

### 9.6.5 Increase in innovations through rebirth

The rebirth transformation journey could open people’s minds to the fact that the future depended on them being proactive, it depended on them solving for the challenges themselves, it was not something to wait to happen, it was not someone else’s job or responsibility. Adjusting this train of thought through the rebirth transformation journey brought forward a natural acceptance, desire and willingness to adapt to and cause a change. With innovation being a focus in the rebirth transformation journey, it is also key to point out that the researcher, together with CoPs as drivers of the rebirth journey took it upon themselves to create a healthy, sustainable and innovative environment and culture to enable efficiency in client experience, as well as system inputs, and outputs which ensured that this was seamlessly achieved with every client interaction.

Figure 9.2 below is a split of various innovations which were logged during the rebirth transformation journey many of which were implemented. It is worthy to note that prior to FNB Private Wealth Client-Servicing embarking on the rebirth transformation journey this BU hardly logged innovations and the very few logged were minuscule and of a technical nature with a focus on product enhancements.



**Figure 9.2:** FNB Private Wealth Client-Servicing Innovations - FNB Innovations System Report (2014-2015)

Figure 9.2 above depicts different innovations logged during the rebirth transformation journey which promoted new innovative thinking within the business unit. Deployment of the rebirth transformation journey enabled leadership to appreciate the value of creating an environment wherein innovations can thrive and therefore, through focussed attention given to various communities of practice (CoPs) within FNB Private Wealth Client-Servicing, energy was given to creating a culture and learned behaviour on how to systematically drive innovations and embed it into the psyche of the organisation. A total of 235 innovations were logged as a result of deploying the rebirth transformation journey. This exhibits the rewards an organisation stands to benefit through

transforming their organisational culture and environment for the benefit of those in the system to create profitable outputs.

The rebirth transformation journey was no doubt a best-fit business solution, which drove tangible transformational results holistically and ecologically increasing ROI both to bottom line but more importantly within the organisational ecosystem imparted through its human capital. In fact, the activity and level of thinking in terms of innovation increased drastically as people bought into the rebirth transformation journey and the power of being able to contribute to better the business and their life's journey within the greater ecosystem. This in turn helped move people not to think and worry about the challenges of facing change, but rather to embrace and welcome change to growing the business and enhancing their success, creating a change agile and nimble organisation which thrives on the opportunity to innovate through change and drive for learning.

“The Rebirth transformation journey experienced was overwhelming, to such an extent that it surprised the leadership teams in terms of the outcomes, but served as the catalyst to take the business forward. In fact, the commitment seen from Consultants in their Communities of Practice and Communities of Experts was also quite remarkable, with Consultants working shifts in a business environment that is pressured in terms of availability to take a call or service request, one can imagine and understand that it is not easily possible for a consultant to take time off the desk to attend to something else. Hence, they would often meet before shift starts or after shift had finished and do work on innovations or run with ideation sessions to continue driving the rebirth innovation process and expanding both within their career and personal lives.”

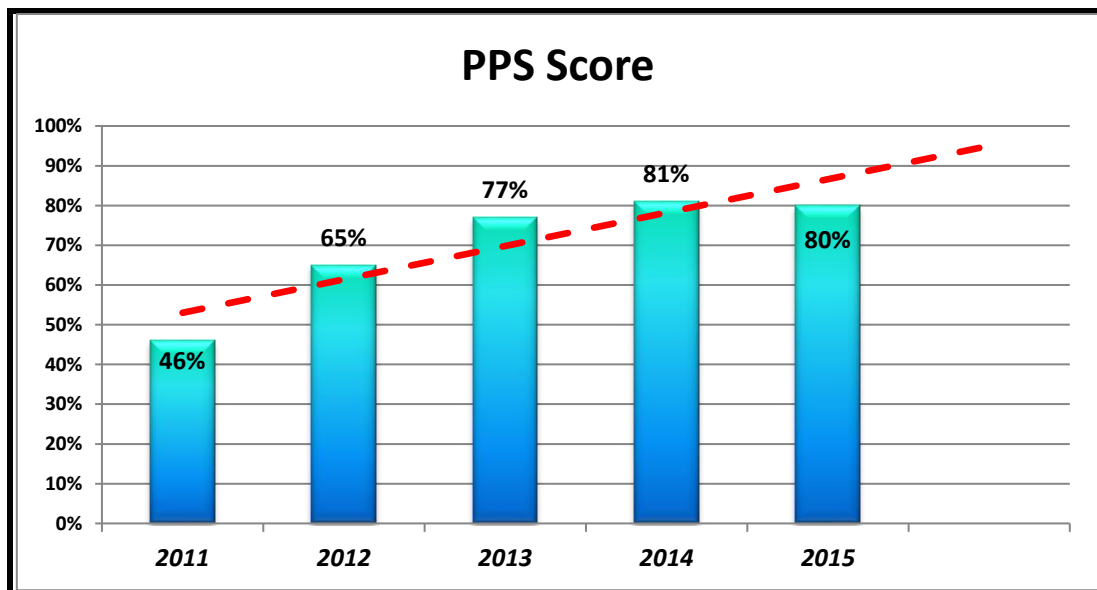
– Horn (2014)

This added to the speed with which innovations were given priority and implemented and gave young consultants good exposure very quickly to the greater business dynamics of FNB and to FNB Leadership. The innovations flow stemming out of rebirth was amazing and reflected the impact that this journey was driving to transform and innovate. This was an area that seldom innovated, coming from an operation that was back office, administration intensive and had received very little investment over the last few years. Rebirth could show FNB Private Wealth Client-Servicing that the current state in which it found itself was a result of a mind-set it had built and that it could indeed step above that, which it duly did with enormous success.

#### **9.6.6 Improvement in engagement survey outputs**

I conducted several surveys amongst the Community of Practice and the Community of Experts with a view to understanding the impact of the rebirth transformation journey within FNB Private Wealth Client-Servicing. The challenges relating to the people pillar engagement scores for FNB Private Wealth Client-Servicing were referred to and these articulate clearly the categories of concerns within this BU being FNB Private Wealth Client-Servicing, resulting in a score of 46%, which was the lowest score achieved throughout the whole of FNB at that time and highlighted and confirmed the extent and enormity of the challenges within FNB Private Wealth Client-Servicing. In response to this and all other identified problems within this BU, I deployed the rebirth transformation journey towards transforming the environment ecologically within the four pillars of: technology, innovation, people and systems with all four significantly presented within the People Pillar Survey questionnaire as referenced in Appendix A.

The rebirth transformation journey created a significant shift within FNB Private Wealth Client-Servicing, and began to drive significant transformation within this BU, directly and positively impacting the people pillar survey results. Figure 9.3 below depicts drastic year-on-year improvement in the FNB Private Wealth Client-Servicing survey results and this becomes a tangible and measurable portfolio of evidence from which the organisation and the Client-Servicing community began to rebuild its brand, strengthen its service offering, create credibility within the entire business and measure return on innovation (RoI) precipitating return on investment (ROI). The year 2011 represents the period pre-rebirth, 2012-2014 depicts the period during rebirth and 2015 is the period post-rebirth.



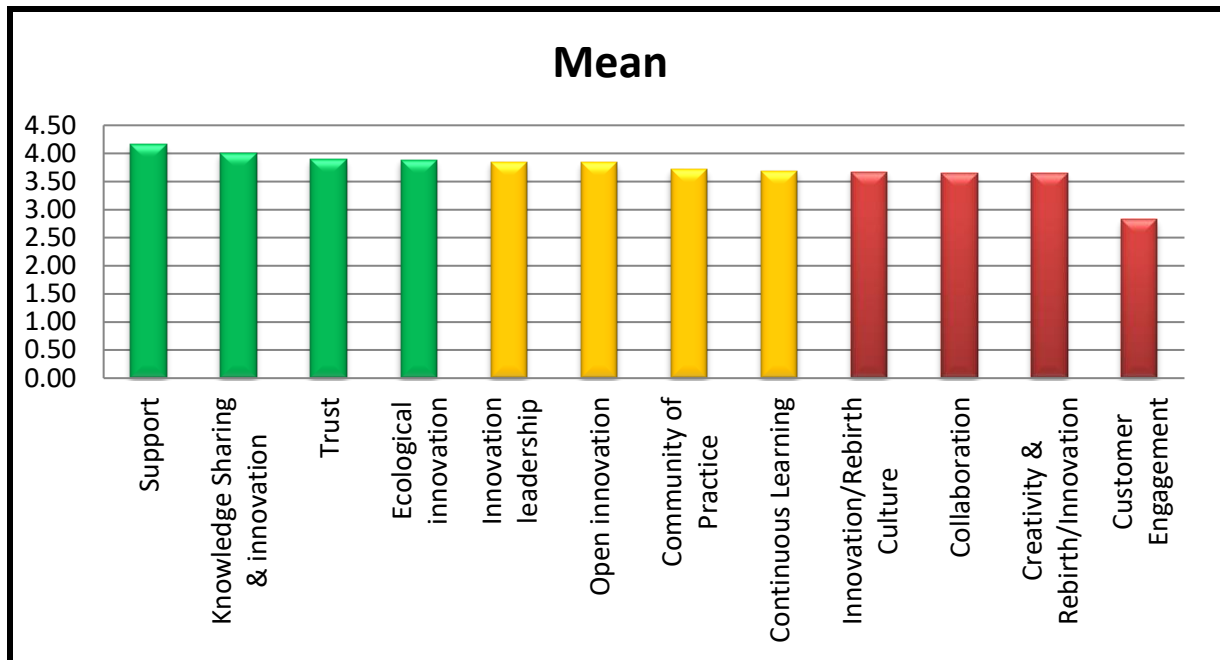
**Figure 9.3:** Taken from the First National Bank Annual People Pillar Survey report (2011 – 2015)

Figure 9.3 above, illustrates the credibility within the greater FNB business, especially when wealth private bankers rose and were now willing to entrust their wealthy clients to the Private Wealth Client-Servicing consultants who increased the reputational capital within this Wealth segment. Essentially before embarking on rebirth, the level of losses and the level of disciplinary hearings were high. Often these were justified as being so because of the nature of the work or the level of the employees and nature of the roles. However, as rebirth progressed within FNB Private Wealth Client-Servicing these numbers started to show a massive impact in the right direction. In fact, in deploying the rebirth transformation journey within this BU, the number and value of operational losses have been very low; sometimes the lowest in the entire Wealth business and the number of disciplinary hearings were also reduced substantially and have been replaced with more career progression opportunities and discussions.

As depicted in Figure 9.4 below I could show the successes from highest to lowest achieved in the rebirth journey. If one looks at where the business started from, themes such as trust, collaboration, open innovation, continuous learning and support were highlighted as key areas of weakness in the BU. Through this survey, I could show how the business was able to move to an enhanced level of commitment and delivery from its people, and how people in the business perceived the change in the business as very positive and there was a beneficial effect that this had on their experience within

the BU. The survey questions were scored out of five and essentially asked the participants to rate the key themes shown in Figure 9.4 below.

Figure 9.4 below shows the average scores as taken from two CoP groups, being the CoP and CoE. I have then taken the average of these scores to be representative of the rebirth transformation journey outcome as experienced and perceived by the CoP and CoE who were core to the process.



**Figure 9.4:** Average scores taken from surveys (2014-2015)

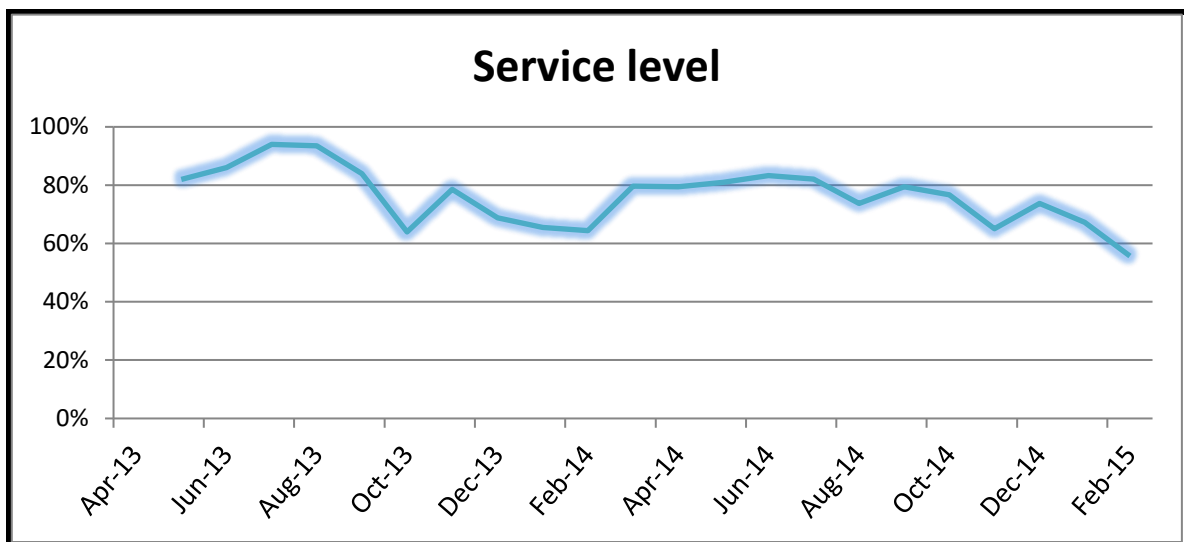
In Figure 9.4 above, the themes identified in the rebirth transformation journey within the case organisation rated well above the 50% mark of a score of 2.50. This is attributable to rebirth. Although customer experience ranked the lowest, the sustainability of this transformation journey is evident as it is through high performance and willingness to transform that will ultimately improve client experience for the FNB Private Wealth Client-Servicing community and the greater FNB through social and sustainable innovation bringing about inclusive transformation.

### 9.6.7 Trends in client service delivery

The visible impact that the rebirth transformation journey had on FNB Private Wealth Client-Servicing, therefore meant that call levels in this BU showed a significant increase over time, as now both the internal and external customers relied heavily on the service within this BU. Improved service levels meant call-and-request volumes increased and as this happened, it would have been normal for service levels to come under pressure and to drop, and the greater the increased volume, the greater the drop in service levels should have been. Whilst this was the case for a brief period, it is worth noting how quickly the results adjusted, and began to maintain at reasonable levels illustrated in Figure 9.5 below. Add to this that for service levels in Wealth, the target setting was a lot higher than the standard call centre service level target in that instead of being required to answer 80% of calls within 20 seconds; the Client-Servicing team set their target at answering 90% of the calls within 10 seconds. The service level was then a measurement as to the percentage of times that this was

achieved illustrated in Figure 9.5 below. This percentage result represents the period post-rebirth, with the pre-rebirth period already shown in Figure 9.4 above.

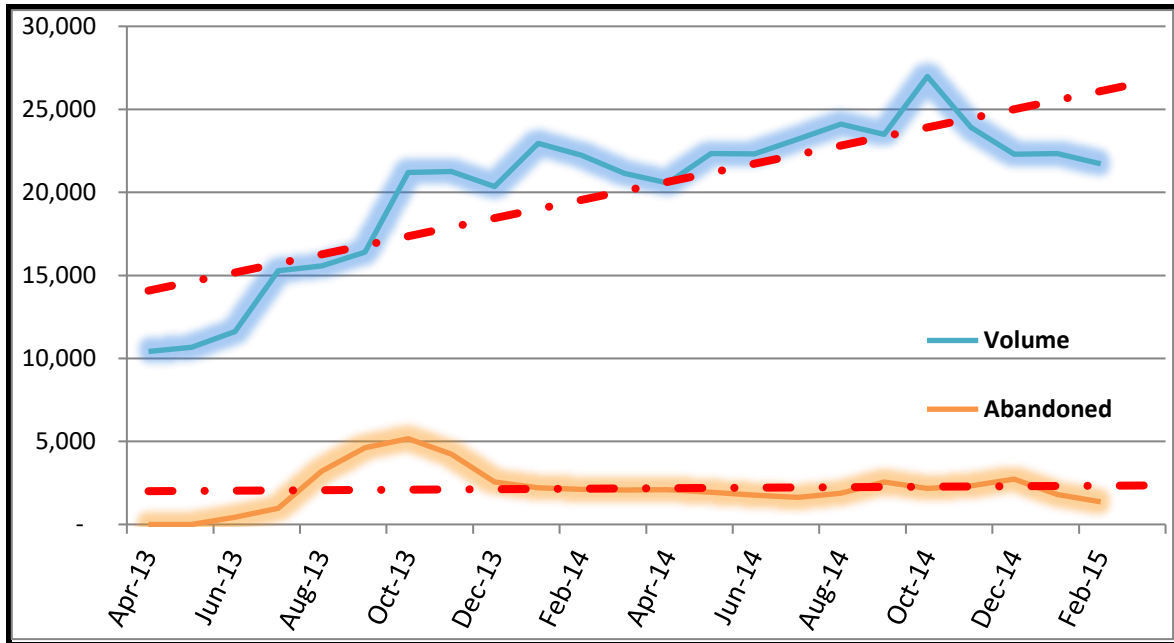
When viewing the service level graph in Figure 9.5 below in comparison to the call volumes graph in Figure 9.6 that follows, from April 2013 to September 2013 there was a much-correlated movement, but this changed after September 2013 when the volumes graph continued to rise. However, the service level graph maintained some consistency.



**Figure 9.5:** Service Levels for FNB Private Wealth Client-Servicing (Business Unit Reports, 2013-2015)

In Figure 9.5 above, service levels within FNB Private Wealth Client-Servicing were on a decline for the period August to October 2013. For the period October to December 2013, service levels improved significantly, but went downhill soon thereafter during the December 2013 and March 2014 period illustrating some instability and inconsistency in service levels. However, the key observation to be made herein is for the period March 2014 to February 2015 during which rebirth transformation journey took place. For this said period service levels remained constant between the ranges of 60% and 80% over a long period of time, being a year. This therefore illustrates the impact rebirth made within this case organisation and reflects that if a community is committed to achieving a communal goal, it is possible to collectively transform the organisational environments which will yield positive results in the organisation's outputs.

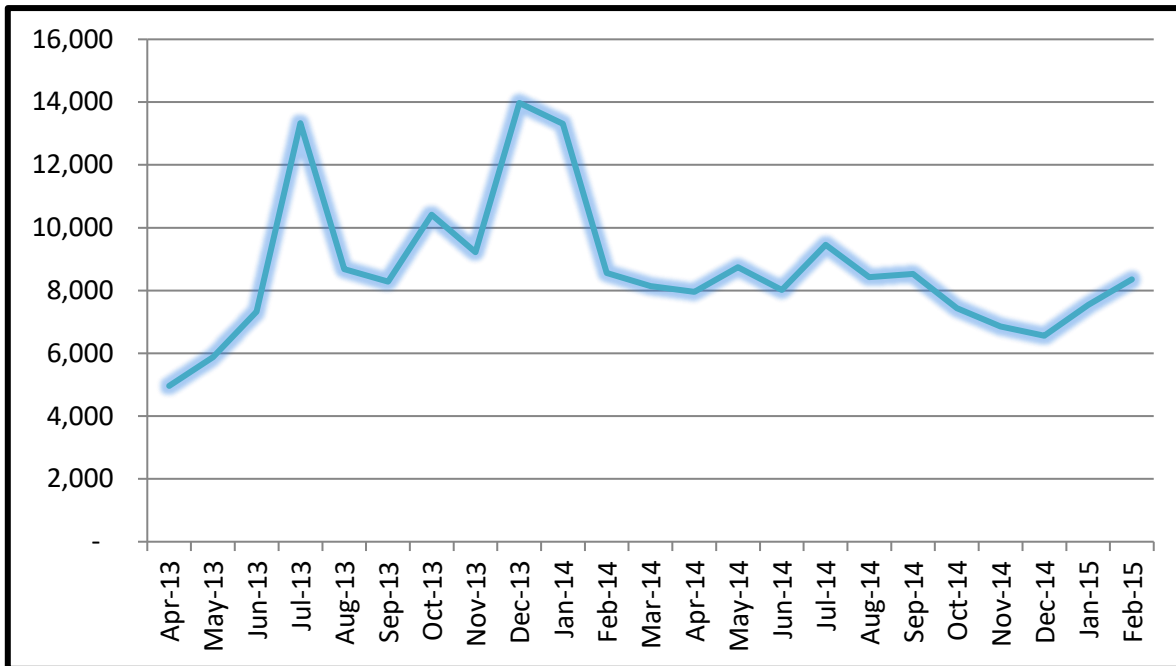
Service request volumes continued to increase as the new service model driven through the rebirth transformation journey became more entrenched, and expanded. What was also key was that while abandoned calls in the old way of doing things had been accepted as a consequence of operation, the new Service Suite became quite focused on maintaining abandoned calls at a low level, irrespective of the volumes increase, and this became a key trigger for managing resource capacity as depicted in Figure 9.6 below.



**Figure 9.6:** Combined call volumes (Monthly business unit reports, 2013-2015)

In Figure 9.6 above, it can be summed up that during rebirth, service levels increased in terms of the call volumes whilst abandoned calls remained minimal. These results may be attributed to the FNB Private Wealth Client-Servicing team’s willingness to do their utmost best in their roles as individuals and as a community. Part of the new Client-Servicing model created and embedded through the application and deployment of the rebirth transformation journey was to take all service functions away from bankers. This was a progressive process as the trust of the bankers and clients who were accustomed to a banker service model had to be gained. At the same time the overall strategy was to get clients to shift to using the Service Suite directly as opposed to sending their service requests through to their banker.

Figure 9.7 below is a statistic which shows the volume of service requests dealt with per month by the non-voice (mid-office) team. These instructions are received either from the voice team or from the client via an electronic channel (e-mail, website, etc.) or otherwise by instruction received from a private banker. One of the objectives and functions for FNB Private Wealth Client-Servicing is to service and support the private banker and thereby indirectly service the client, through which they will create capacity for the banker to spend more time with clients in an advisory capacity as opposed to a service capacity. Figure 9.7 below illustrates the upward movement of client requests received indicating that this business unit is well on its way towards achieving its set objectives.



**Figure 9.7:** Combined service requests (monthly business unit reports, 2013-2015)

The results from the above graph in Figure 9.7 above, exceeded Client-Servicing leadership expectations. In just over a year of deploying the rebirth transformation journey, FNB Private Wealth Client-Servicing managed to more than double the volume of service requests which they efficiently serviced, achieving an unparalleled service level within this business unit. Initially most of these requests came from bankers, but over time clients started to shift to sending their requests or calling into the Service Suite directly. Against the background of how the Service Suite was previously perceived, the greater executive leadership within FNB saw these results as a significant accomplishment, more so to have speedily gained the trust and respect of bankers and clients alike.

This brought about a shift in the type of service functions being handled by FNB Private Wealth Client-Servicing. Several non-core clients facing functions that were identified as being more product fulfilment type functions were moved back to the relevant product houses where they belonged. At the same time, several core client-facing service functions that did not require face-to-face Private Banker interaction were taken on by FNB Private Wealth Client-Servicing. Add to this that when taking these on, they, by default, looked at improving and enhancing the system or technology aspects thereof to improve the client experience.

Through new leadership, community leaders who form part of the various communities of practice are now able to take responsibility for client-centred actions and accept responsibility for the areas that need to be improved, and imbed values and morals that are in line with the 2025 vision which drives strategic and innovative thinking. This shows that in normal business circumstances, as volumes increase, the level of service delivery will either drop or the cost of servicing due to increasing the resource volume, will increase. Rebirth, amongst other things focuses on increasing service levels, while at the same time increasing transactional volumes, without there being an associated increase in resource costs. What is further evident is that this dynamic has continued to unfold even after February 2015 which is post-rebirth, where FNB Private Wealth Client-Servicing is now seen as the

benchmark for all servicing teams within the greater FNB group, and is often considered or placed top of mind in strategic discussions within FNB, involving improved client service as well as improved client experience. The question that remains is how to replicate the rebirth transformation journey and make a systemic and sustainable model that drives consciousness of the entire organisation.

### 9.6.8 Complaints and Compliments

As previously mentioned, complaints were low in the initial stages of rebirth, but that could be attributed to the lack of reporting thereon for the area. However, compliments were also rather low and it was only after the implementation of the rebirth transformation journey that a drastic increase in compliments could be seen with not so drastic an increase in complaints while client volumes were increasing rapidly over this time. This can be attributed to the significant shift in values for the area to accept accountability and to recognise that a complaint was also an opportunity to better serve and innovate to satisfy client needs and to provide an end-to-end and seamless client experience thereby living the newly inculcated servicing ethos captured in: “I Care (Heart); I Can (Head); I Commit (Hands).”

As a result, and through rebirth, measurements were not seen or perceived to be a means of serving punishment, but rather to improve. Figure 9.8 below shows how this shifted, and how compliments have remained higher than complaints over an extended period. This slowly started to play out across the BU, client complaints and compliments were scored, but they were all reported on and consultants and leadership found wonderful opportunity in instances where they could run with the complaint effectively and efficiently without fear. Even in matters such as the quality assurance process, people began to embrace this in a new light, being far more prepared than ever before to use it as a tool to help them improve their service delivery as opposed to a stick with which to hit them, with and serving with purpose. The same could be said for risk control measures. So too in this the team began to work more with the quality assurance and risk teams as opposed to seeing them as the enemy and this in turn helped to grow the business more as opponents.

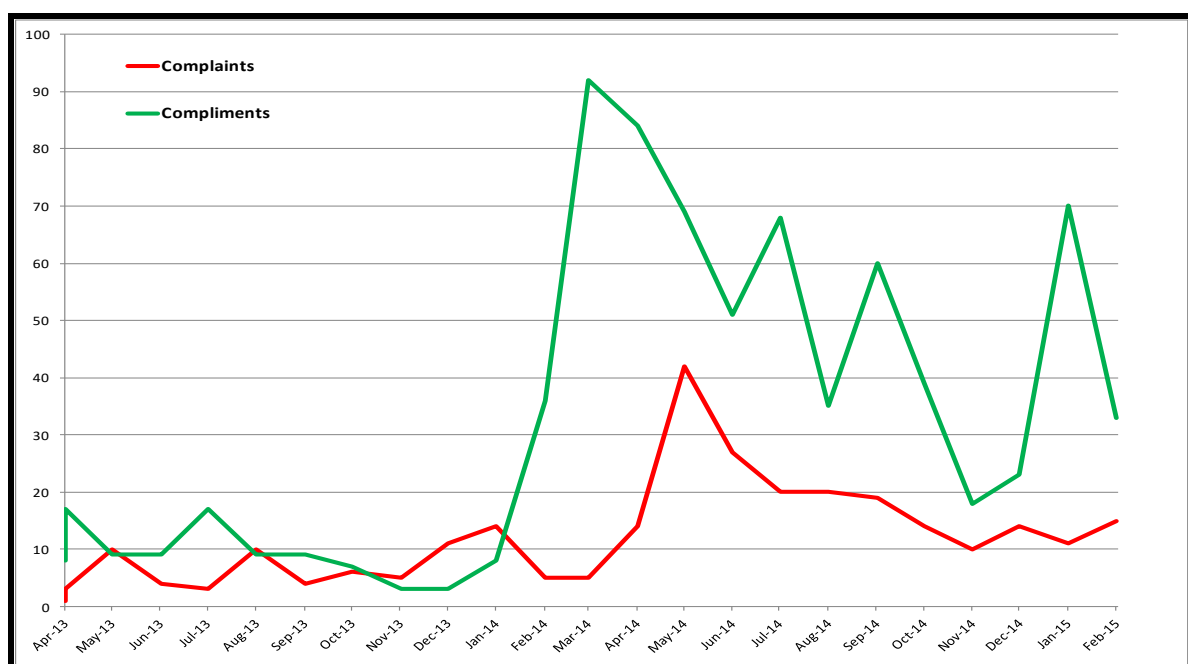


Figure 9.8: As taken from the FNB Client Service Reports (2013-2015)

Figure 9.8 above depicts the impact of how the Rebirth transformation journey played a key role in changing the perception and fear of people in this business area (both the leadership and employees), as it is through rebirth that each individual was able to be brought back to the South and to relearn that the measurements and the processes were not there to provide retribution, but in fact were there to tell a story and to assist them in growing their business and improving on the things that would ultimately make them and the business great, by beginning with self.

#### **9.6.9 Increase in servicing ethos**

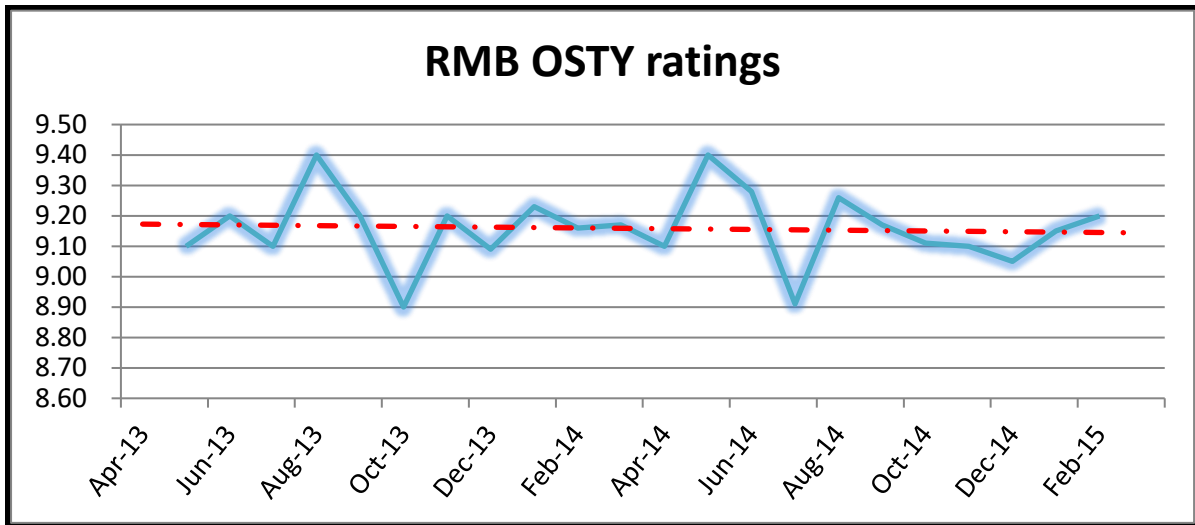
In introducing the rebirth transformation journey to FNB Private Wealth Client-Servicing, I was compelled to embark on a facilitated process of enabling and empowering FNB Private Wealth Client-Servicing to define and craft its business vision. This process was to ensure that the Client-Servicing leadership, together with the entire servicing community, were empowered and aligned by a common vision captured in an ethos, clearly articulating their mandate to deliver towards the FNB 2025 vision. This visioning process was designed to align the thinking of all FNB Private Wealth Client-Servicing stakeholders around technology, innovation, people and systems, and was to become a measure of service excellence and a basis for building a new servicing culture articulated through the philosophy of: “I Care, I Can, I Commit”. Together with that, the application and deployment of the rebirth transformation journey, came about a definitive change in focus for the FNB Private Wealth Client-Servicing consultants to drive a new rebirth culture through structured and empowered communities of practice.

This shift amounted to an environment driven by a clear measurable vision wherein resilience, accountability, ownership and innovation were critical. This became an environment which thrived on change and innovation, thereby embracing being agile and nimble towards providing an unparalleled and seamless client experience. This therefore meant that engagement increased and consultants ceased being at work simply to clock a work ticket, but their focus rather became about serving clients purposefully to the best of their ability at all times and ensuring that clients walked away satisfied and with a feeling of being cared for, which meant this traditionally blue and red bank was moving towards purple, brown and yellow human niches driven intrinsically by the Southern norms of *Botho-Ubuntu* and community (we) instead of the traditional Western norm based on (I) driven primarily through the head quotient (IQ).

It is through the leadership decision to embark in the rebirth transformation journey that the service philosophy of: “I Care, I Can, I Commit” was birthed, and was quickly and effectively adopted by all and became a very strong philosophy. Part of this entailed driving strategic relationship between the Service Suite consultants and the private bankers, ushering in a working together of both internal and external client. Ultimately leading to an integrative client experience, which then clearly through embracing the rebirth journey, would lead to the below measurement of customer satisfaction being of a sustainably prominent level.

The business introduced a new service measurement, which essentially amounted to a client service feedback survey, called “Our Service to You” (OSTY). As a result, client satisfaction measures through “Our Service to You” (OSTY) survey from early on reached nine or more, and was maintained at that level consistently over time. The standard across the greater FNB ranged between 6 and 8 out of 10, to the extent that other similar service areas in FNB began a campaign called nine plus (9+), which was

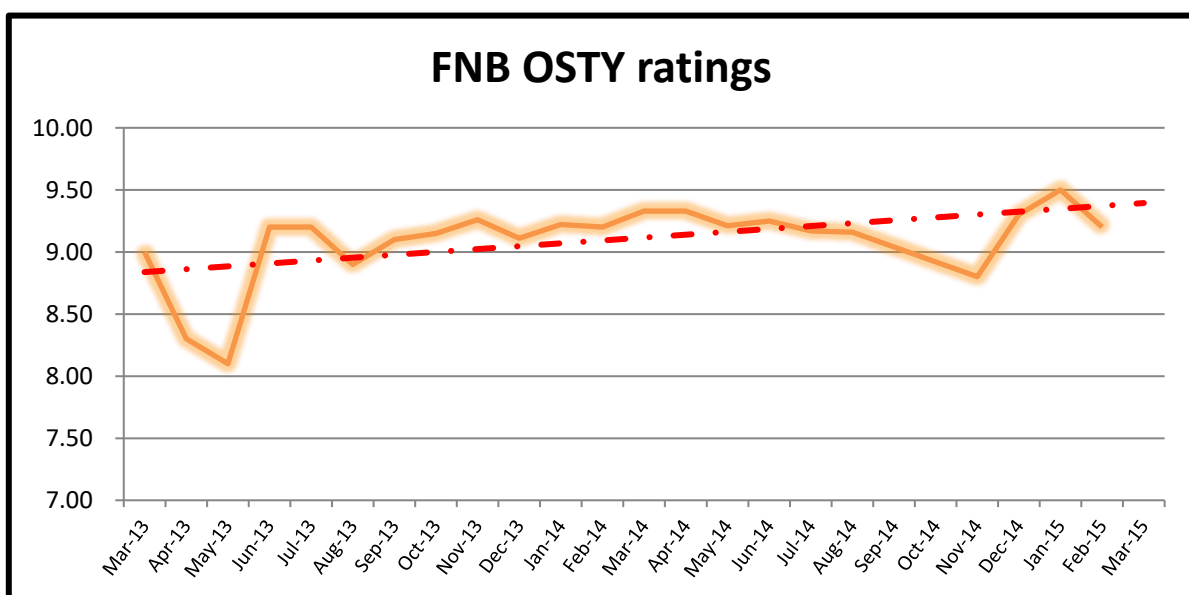
aimed at getting their average ratings above nine out of 10; the spike in OSTY ratings is depicted in Figure 9.9 below.



**Figure 9.9:** RMB Service Suite OSTY Rating (Client Service Reports, 2013-2015)

Figure 9.9 above shows how FNB Private Wealth Client-Servicing became a team that even with the challenges of rapidly growing volumes, could have their clients rate their interactions a nine out of 10 or higher. This service measure essentially meant that clients were asked to score their interaction and experience with the consultant out of 10, with the opportunity of providing comments.

Figures 9.10 below illustrates how through the deployment of the rebirth transformation journey, clients now experienced superior service both during and after the rebirth journey from both the RMB Private Bank Service Suite team and the FNB Private Wealth Service Suite team with an increasing number of client experiences being rated well above the nine out of 10 mark, being a remarkable achievement.



**Figure 9.10:** FNB Service Suite OSTY Rating (Client Service Reports, 2013-2015)

Figure 9.10 above illustrates that through the application and deployment of the rebirth transformation journey, a superior client-service approach was brought to bear within FNB Private Wealth Client-Servicing and from early in the rebirth journey both the RMB and FNB teams were averaging at scores above nine out of 10, which was a leading score across FNB, where the average ranged around eight out of 10. This is tangible proof and an indication of the positive impact that the rebirth transformation journey brought about within FNB Private Wealth Client-Servicing resulting in visible organic, ecological and inclusive transformation captured through the ethos: 'I Care (Heart), I Can (Head), I Commit (Hands)'. This was especially crucial and effective as it was further the intention that the environment would never be the only place a consultant would work, but rather would serve as the breeding ground for future talent development and career progression encouraging forward and future thinking within oneself and the greater FirstRand Group ecosystem.

With the deployment of rebirth, FNB Private Wealth Client-Servicing leadership were empowered to understand how to engage transformational leadership towards being and becoming and move away from the traditional transactional management style of leading which they had become accustomed to considering the context of the challenges of this unit as previously articulated. This meant they were quickly enabled to equip consultants to understand why rebirth was such a core requirement to ground them in the ethos and philosophy of this BU as rebirth also gave them the tools with which to deliver on the strategic intent. This quite simply meant that consultants were enabled and empowered on the purpose for their existence through grounding in the Southern relational path of community and re-engaging the communal spirit to inquire and to enquire on communal issues of identity, belonging and purpose (Lessem & Schieffer, 2010).

This enabled the way in which they could deliver on that purpose, thereby unlocking their potential and experiencing exponential growth organically and ecologically, becoming sought after business brands which in themselves became a living theory of the power of the womb of rebirth to cause organic and ecological transformation through the rebirth transformation journey. The service level is something to behold with the appropriate understanding of the service level required, being at a higher standard than is applied across most call centres and then add to this speed and level of volume increase, which was not aligned to a proportionate increase in human capital resources. The volumes increased drastically, while people resources only increased marginally, and yet service levels were still maintained at an acceptable level, with a low attrition in terms of abandoned calls.

### **9.7 Sustainable technological and innovation competencies and key recommendations**

In addition to continuous education communities of practice are formalised in FNB Private Wealth Client-Servicing to increase technological competency. They serve as a place to cultivate and expand innovation and knowledge practices. In terms of education the individuals and teams are to be exposed to training in technological fore sighting which involves the systemic attempt to look at the long-term future of science, technology, the economy, the environment and society with a view of identifying the emerging generic technologies and underpinning areas of strategic research that are likely to yield the greatest economic and social benefits and scenarios that craft stories of possible technological futures of what could happen and what should not happen.

Technological knowledge circulates in a very dynamic way, and moves, often erratically and unpredictably, within communities of practice and is filed in knowledge bases. It is necessary to codify the information in order to become usable throughout the organisation, and to deploy knowledge bases and idea brokering within the FNB Wealth Client-Servicing environment. Innovation emerges when the existing solutions no longer serve their purpose and new technological responses are called for. Responsiveness is listening to the client and reading the marketplace. It is faced with the particular client needs that a customised solution should be developed ensuring that the solutions and new learnings are not merely institutionalised, but shared, and the results are encouraged through learning.

To bring ideas to fruition FNB Private Wealth Client-Servicing requires an organised methodology of identifying and developing new ideas through collaborative discussions and technological funnelling workshops. In order to support the above objectives, it is vital that collective answers be found and the necessary actions be driven to establish a technological environment in which people can innovate, learn and be creative whilst implementing the new CRSMP system. The following questions need to be considered:

- i. Where is FNB Private Wealth Client-Servicing heading?
- ii. What kind of information is required to move FNB Private Wealth Client-Servicing forward?
- iii. Where does that information reside and how is the CRSMP system renewed?
- iv. What competencies are required to be able to achieve higher levels of client service?
- v. What collaborative structure, processes, roles and incentives are needed to support the renewal and application of knowledge to implement the CRSMP system?
- vi. What measures would help knowledge workers to track progress in service delivery of the CRSMP system?
- vii. What current cultural assumptions are needed to support on-going learning and innovation on the rebirth transformation journey?

In order to support technological innovation competencies, it is also important to formalise a culture of innovation for achieving openness regarding information sharing. Leadership should be accountable for supporting and modelling collaboration and empowerment as new innovation learning from the core function that drives the CRSMP system and business strategy. Below are policy recommendations towards driving transformation and a new servicing culture through rebirth bearing the abovementioned questions which were considered to enable these recommendations to be adopted.

## **9.8 Policy recommendations to embed the rebirth transformation journey, drive inclusive transformation and a new servicing culture**

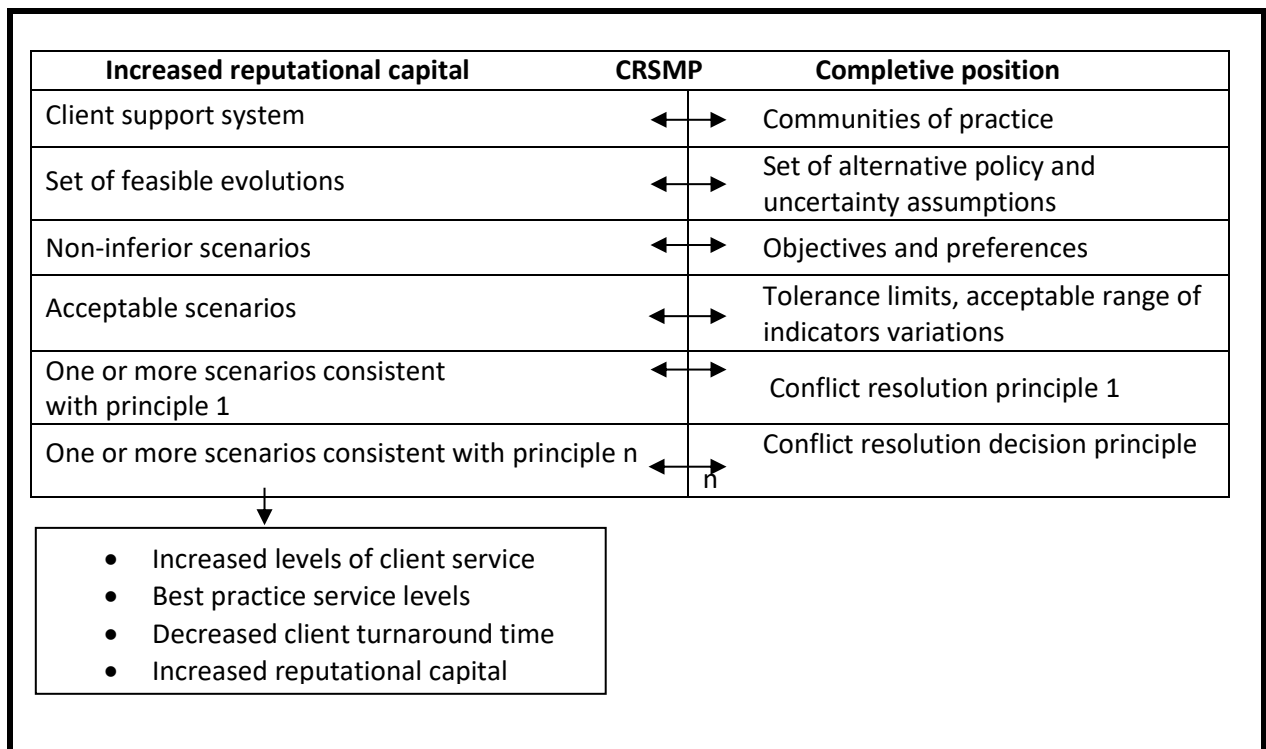
### **9.8.1 Policy Recommendation 1: Technology promotes key tactics for distributing increased customer capacity within FNB Private Wealth Client-Servicing**

FNB Private Wealth Client-Servicing is a large organisation employing many people, and is mandated to create client loyalty in an environment where people are exposed to learning so that they can grow to their full potential and contribute in a meaningful manner toward the 2025 vision. The main area of concern is that the value of employee dignity and respect needs to become entrenched in consistent leadership behaviour where consultants are respected as the most important asset. The key tactics for redistributing clout is a mandate given to leadership, and furthermore to imbed a culture of resilience within organisations.

### **9.8.2 Policy Recommendation 2: Formalising technological custodianship through new competencies**

All employees are encouraged to participate in finding new idea generation to solve the technological challenges which concern the business to thereby achieve a competitive resilient advantage. This will mean that the encouragement of leaders and the support of knowledge workers will be imperative for formalising the CRSMP system and all the technological competencies that are required to establish sustainable custodianship. Through integrative behaviour that allows for setting out clear career pathways for knowledge workers it becomes clear that the specialist approach prevalent in the finance industry and mirrored in FNB Private Wealth Client-Servicing is outdated, and counters the vision towards technological sustainability.

Most of the challenges in FNB Private Wealth Client-Servicing and other organisations do not exist in isolation but tend to be a complex interaction between diverse variables. Detailed analysis of the FNB Private Wealth Client-servicing challenge cannot be seen in isolation of the total technological environment as this severely limits the leader's ability to identify a sustainable solution. The rebirth transformation journey thus provides a powerful holistic tool, enabling leaders to gain insight into the context in which they must operate, and affords the opportunity to find sustainable technological solutions that are more elegant than if they had used a purely analytical or deductive approach as can be seen in Figure 9.11 below.



**Figure 9.11:** The CRSMP technological system perspective

Figure 9.11 above indicates how a culture of resilient leadership drives the individual knowledge worker, the community of practice and essentially leadership resilience within the entire organisation through a systems approach. It is essential for leadership to realise that the input and output process of culture is embedded through the experimentation phases of rebirth and integrated into the institutionalisation phases of innovation through formal communities of practice. Unless the rebirth culture is embedded in corporate memory and aligned with strategy; FNB Private Wealth Client-Servicing cannot successfully leverage the new tacit culture held by its collective members.

### 9.8.3 Policy Recommendation 3 – An innovative culture for resilient leadership to drive the CRSMP technological system

Technological management takes place within complexity, and the CRSMP systems journey endeavours to establish competitive advantage and consistency by drawing formal strategies and monitoring results. Innovative leadership, in contrast, is about transforming, establishing direction by developing a vision of the future and then aligning technology through communication and inspiration. Managers use the research inherent to their designated technological positions to obtain compliance from FNB Private Wealth Client-Servicing employees. Leadership needs to develop the ability to influence for FNB Wealth Client-Servicing achievement of the technological goals and to provide a challenge for creating visions of the future and for inspiring global competitiveness. Leadership is important for advancing technological management (Wilber, 2000).

These add to the accumulation of knowledge, which is deposited in the organisational memory (Field, 2000). These networks of relations that develop within strategic technological interactions improve the flow of information within the knowledge accumulation and rebirth functions (Byrne, 2005). Creative leadership and the availability of technological resources are essential to the process of idea generation to take place amidst the ability to accumulate knowledge which hinges on leadership

facilitation as a centralised direction, and by diffusing responsibility to the communities of practice that are most directly concerned (Wheatley, 2002). Leadership exchanges are based on the individual exchanges between people to expand their shared cognitive environment and are constructed within knowledge networks for promoting creative leadership within the technological opportunities based on the shared vision of the various CoPs (Stokes & Logan, 2005).

Creative leadership is directed towards future opportunities through collaboration, which is imperative for strategic implementation to take place concomitantly within a dynamic financial environment. Leadership should drive technology in FNB Private Wealth Client-Servicing towards sustainable success through inter-functional alignment with people to thereby enhance team effectiveness and individual creativity and ultimately deliver efficient client service and achieve the FNB 2025 vision. The need for a culture of resilient leadership argues the importance of individual knowledge worker's commitment through experimental and institutionalising resilience (Wilber, 2000) and (Twiss, 2005).

## **9.9 Conclusion**

In this chapter I presented my research results, findings and policy recommendations of deploying the rebirth transformation journey within FNB Private Wealth Client-Servicing. These were derived from the qualitative research results and findings derived from the data-gathering methods being, auto-ethnography, listening and engagement surveys; CoP focus group discussions, in-depth interviews, participative observations, key informants, journals, notes and archetypes from a sample of fifteen CoP members. Given the results detailed herein, it becomes clear that in 2012 the business needed a mind shift which prompted a new vision which emerged through deploying the rebirth transformation journey. However, the leadership chose to embark on this rebirth transformation journey with a hope and vision of fundamentally changing their business unit to be a world-class banking service to its Wealth Clients as a community.

The concluding chapter of this thesis will be presented in Chapter 10 wherein my Contribution to the field of study being OCD will be outlined. REBIRTH as an integral method for inclusive transformation, catalysing social innovation will be addressed. The research questions and objectives and future research possibilities will be discussed.

## **CHAPTER 10: Contribution – A full view of the thesis through the 4C integral journey**

*The regeneration of Africa means that a new and unique civilisation is soon to be added to the world. Civilisation resembles an organic being in its development – it is born, it perishes, and it can propagate itself. More particularly, it resembles a plant, it takes root in the teeming earth, and which the seed fall in other soils new varieties sprout up. The most essential departure of this new civilisation is that it shall be thoroughly spiritual and humanistic, indeed a regeneration moral and eternal.*

-Mbeki (1906, as cited in in Nussbaum et al., 2010:30-31)

### **10.1 Introduction**

Chapter 10 is the closing chapter of my thesis, becoming the end of my 4C integral journey wherein I share my contribution with the world, community and society as part of building on from various stages experienced in this journey as presented in the preceding chapters towards REBIRTH. I adapted this journey from Lessem and Schieffer (2010) IRA herein referred to as Call, Context, Co-Creation and Contribution. In this chapter, I begin by reflecting on the complexity of this age towards inclusive OCD processes and inclusive transformation being a challenge within immediate ecosystems in self and other, flowing into organisational ecologies, community, society and the larger world (Field, 2000) and Viljoen (2008).

The transformational methods applied in this research, is a result of current being, which mostly produce unsustainable transformational solutions culminating in greater loss in identity, creating a sense of discard and dehumanisation (Matupire, 2014). This causes organisations to spiral in and out of organised states of chaos with an inability to transform in an inclusive manner. This inability becomes the burning issue from which I locate my burning desire to embark in a journey towards authentic identity resulting in my conceiving, conceptualising a frame captured herein as REBIRTH of self (I), other (WE), organisation (US) and the greater ecology (Lessem & Schieffer, 2010) and Mbigi (1997). This multi-layered REBIRTH is grounded in the Southern relational path of community and reason as coined by Lessem and Schieffer (2009) ensconced in the philosophy of *Botho-Ubuntu*, presented within this thesis as relevant lens and science towards inclusive transformation (Viljoen, 2009). For Lessem et al., (2013), building on the works of Husserl (1970) and Abram (1997), individuals cannot separate themselves from their immediate locality in order to gain knowledge, for knowledge gained in such a way is not only shallow and artificial, but also divorced from the authentic experience of being human. Mazrui (1990) states that failure to develop local identity, inhibits evolution. Having that knowledge becomes a powerful tool for liberation and not domination. For Lessem et al., (2013), the “feel local identity” is the place to start and “act global” with integrity is the place to end “becoming transcultural” is what lies in between.

Rebirth is defined within this thesis as a visible outcome and manifestation creating an ecological transformational shift within an ecosystem through the rebirth transformational journey. In this thesis, Rebirth with uppercase “R” refers to my own personal Rebirth journey on which I embarked to uncover my authentic identity. Within FNB as my research landscape, I facilitated the rebirth transformation journey which I designed and, together with my PAR team, implemented within the case organisation, FNB Private Wealth Client-Servicing. This journey is my unique contribution which I offer as new knowledge towards inclusive transformation which I call REBIRTH (Viljoen, 2008). This REBIRTH may be implemented in other organisations, and is my contribution to the field of study.

In Chapter 1, I outlined the research objectives for embarking on the 4C Integral journey, together with the community of practice and fellow PAR team towards uncovering an integral solution for organisational change and development called rebirth, applied within FNB Private Wealth Client-Servicing. The innovation of the rebirth transformation journey is its ability to tap into traditional African wisdom and indigenous leadership models towards holistic organisational change and development as a relevant solution to transform a business unit which had become a liability within the greater FNB brand.

The thesis is grounded in the Southern relational path of community and reason, and seeks to propose that the time for re-engaging the South, its norms and gift of *Botho-Ubuntu* is now (Lessem & Schieffer, 2009). The South, representing Africa in this thesis, locates and reconnects humanity back to authentic identity in humanness as a valuable construct for today's complex and ever-changing world (Viljoen, 2008). This Chapter therefore represents the fourth and final C of my 4C integral journey being Contribution and captures the contribution I bring through the journey of Rebirth on which I dared to embark, culminating in the rebirth transformation journey I deployed within the FNB case while applying the REBIRTH framework I designed.

The REBIRTH framework represents the OCD and transformational solution I design and engages Southern norms, practices and wisdom as indigenous and organic lens towards inclusive transformation, catalysing social innovation. This framework is an integral tool designed to drive inclusive transformation by grounding to Call in authentic identity through integrating eight human aspects.

In reflecting on the relevancy of the South and what it has to offer towards inclusive transformation, I am drawn to two African proverbs which state: "He who is not taught by his mother, will be taught by the world" and other which states, "Until the Lion learns how to write, every story will glorify the hunter." As I reflect on the poignancy of these proverbs I am consciously awakened that it is time to raise Africa's voice and reclaim the contribution she brings as starting point of civilisation. The echo of the proverb evokes my Call to ground, and reconciles authentic identity through the South, engaging a rebirth conception in my being, towards becoming in the East in communal rebirth awakening and responding as one through cultural heritage.

The experience towards being and becoming creates a sense of collective transformation through rebirth exploration in the North re-engaging communal realities and co-create through indigenous knowing to catalyse rebirth Uhuru in the West bringing Southern value preposition in doing, thereby transcending conflicting ideologies and historical imprisonment in collective humanity (Mbigi & Maree, 1995). This is my Call and Contribution creating a desire to take up my African shield and spear as rebirth matriarch, and pen Africa's voice and indigenous wisdom through the experience of my own Rebirth and cultural heritage, the rebirth transformation journey as applied within the case organisation FNB and my Southern OCD solution being REBIRTH as a relevant science and lens towards inclusive transformation catalysing social innovation.

The current world complexity points to a sense that all around, the world is groaning, bellowing for something yet to be born to ground and reframe identity and value of humanity towards ecological transformation and this bellowing is for Africa's innate wisdom, indigenous norms, rich practices and sacred rituals to ground transformational solutions, while organically reconnecting humanity and ecology. Adodo (2016) cites Sankara (2007) stating that there could be no true liberation for Africa

without the true liberation of women. In equal measure, there can be no integral transformation globally, without the true presence of the Southern voice – being, Africa. This thesis is my burning desire to conscientise Africa towards authentic identity in indigenous knowing as new lens and relevant science in reframing the future. According to Freire (1993), a person who is conscientised has a different understanding of history and his or her role in it. He or she will refuse to become stagnant, but will move and mobilise to change the world knowing that it is possible to do so. Sarkozy (2012) stated that: “The tragedy of Africa is that the African has not fully entered into history...They have never really launched themselves into the future.” Khoza (2005) states: Africa has a lot to teach the world about human values and how the vision of the organisation is linked to community spirit.

REBIRTH connects us to our oneness in humanity through community, and in community we uncover the gift of diversity towards inclusive transformation. Matupire, (2014), writing about the rebirth of African civilisation posits that in the rush from primitive life, man left behind elements that were needed for a truly civilised life such as the sense of community, direction and purpose. The spirit of community (*Botho-Ubuntu*), prevalent in Africa, makes it a very important continent, pointing towards a renewed civilisation in the world. Writing about the rebirth of African civilisation, Williams (1993) posits that in the rush from primitive life, man left behind elements that were needed for a truly civilised life such as the sense of community, direction and purpose. The spirit of community espoused through *Botho-Ubuntu*, which is prevalent in Africa, makes it a very important continent pointing towards a renewed civilisation in the world (Matupire, 2014).

## **10.2 The integral journey**

Employing the thesis research path of IRA equipped and propelled me to re-engage issues of identity through the 4C integral journey grounding to Call in the South, emerging through the East with communal Context, navigating to the North to Co-create aligned understanding of communal burning issues and effects a unique Southern Contribution in the West (Lessem & Schieffer, 2010). This REBIRTH journey is unique and informs my contribution towards existing knowledge as it propels me to embark on a 4C integral journey grounded in the Southern relational path of community while embracing East, North, West perspectives; creating balance while fostering an integral approach (De Vos, 2002). Engaging the rebirth transformation journey uncovered world divides, and unlocked possible healing through collaborating with my study sponsor and the PAR team within FNB Private Wealth Client-Servicing which is in line with the foundational research methods of the IRA GENE phenomena as discussed in Chapter 6 of this thesis being, descriptive, phenomenology, feminism and PAR (Lessem & Schieffer, 2010).

Growing up in South Africa informed by an inhumane system of governance called Apartheid empowered me to observe and engage a deep enquiry into issues of identity, and how grounding in a Southern relational path of community became a relevant platform for locating identity towards inclusive transformation. This also brought out within me the matriarch and warrior archetypes taking me on a journey of rediscovering my Southern roots and heritage, rich norms and deep wisdom captured through symbols, stories, sacred rituals, humanness embraced through *Botho-Ubuntu* (Mbigi, 1997) and Ackoff (1971).

Working within the OCD field exposed me to Western, Eastern and Northern ways of approaching OCD. This fuelled an insatiable desire within me to re-engage my Southern indigenous knowledge,

igniting a Call to envision the rebirth transformation journey as relevant transformational solution grounded in Southern norms towards a fresh lens in OCD practices. The 4C integral journey is purposeful, grounding me to my Call to transform our world through Rebirth in identity and authentic self-leadership. The calling emerges through my lived experiences because of surviving and learning how to navigate the complexity of growing up under a system of governance designed to breed separateness, discord and social disintegration within self, community and society (Laubscher, 2013). This becomes the burning issue for which I propose REBIRTH as organisational change and development solution towards inclusive transformation catalysing social innovation.

### **10.3 Integral Research Approach (IRA)**

Integral Research Approach (IRA) as a research methodology enables one to ground to Call through lived experiences which engages auto-ethnography (Viljoen, 2016). The IRA path and GENE phenomena comprised of various data-gathering methods which I used to connect and conduct research within FNB Private Wealth Client-Servicing. As illustrated in Figure 6.1 of this thesis, my pre-intervention investigation was conducted through auto-ethnography which encompassed my story as presented in Chapter 2, the story of my culture presented in Chapter 3 and the story of FNB Private Wealth Client-Servicing, presented in Chapter 4 of this thesis. I analysed my pre-post intervention through listening surveys and community engagements to gather more data on rebirth practical learning as well as to measure shared knowledge transferred during this journey.

The research path applied in this thesis followed the GENE phenomena through descriptive method (Grounding), phenomenology (Emerging), feminism (Navigating) and PAR (Effecting) (Lessem & Schieffer, 2010). IRA is a qualitative research method of phenomenology towards social and economic innovation which is trans-cultural and trans-disciplinary building on the knowledge from all four worlds being, South, East, North and West (Lessem & Schieffer, 2009). IRA is rooted deeply in individual specific cultural context aimed at addressing individual or societal burning issues at the level of self, organisation and society thereby enabling global integration (Makangira, 2015).

### **10.4 My Motivation in engaging the integral methodology of IRA**

The integral transformational method of IRA empowered me to understand the vast knowledge of thinking available and expanded my understanding to see that there are other integral thinking strategies to imagining and enacting ideal futures for transformation. These methods include self-introspection for self, other, organisation, community and society to synthesise into a larger world rather than to reductive thinking. As contextualised in the South, this thesis explores the issue of identity and the gift of grounding to Call through the Southern relational path to awaken self-leadership and inclusive transformation.

Adodo (2016) states: “Social research is built on a faulty foundation, a one-sided methodology that is heavily biased towards the West, and systematically neglects the South and East, if not also the North. Yet, the foundation and origin of civilisation lies in the South. The only way forward is for research to go backwards to reconnect with the foundation story of humanity, in order to chart a meaningful path to the future.”

## **10.5 The Southern worldview and grounding to our humanness**

Human disconnect, discard and dehumanisation through loss of identity is a phenomenon with which the world at large is grappling, delineating being from grounding to Call in authentic identity. To redress this disconnect, it becomes necessary to Rebirth through grounding to Call to cause transformation of self towards inclusive transformation (Albrecht, 2004). In the South, we reconnect to Call through our humanness and communal co-creation to catalyse social innovation (Lessem & Schieffer, 2010). The Southern philosophy of *Botho-Ubuntu* grounds to the gift of humanity and reconnects self, other, organisation, community and the larger world, thereby acknowledging universal wholeness and transforming in an inclusive manner (Viljoen, 2008). Per Muendane (2006) African tradition is based on spirituality, collectivism and a people orientation: Ubuntu. If we live in a sane society based on a universal value of purpose, compassion and a common humanity the African paradigm is the way to go. Khoza (2006), states that *Botho-Ubuntu* is concerned with establishing harmony in diversity and creativity in community.

## **10.6 The adapted REBIRTH framework as new science and Southern contribution**

### **10.6.1 Positioning the rebirth integral framework**

I carry the rebirth experience as new sensing emerges owing to grounding to Call in the South incubating a Rebirth conception through my story, emerging in communal awakening through the story of my culture in the East wherein communal Context is interrogated, navigating through the North in communal Co-creation and effecting a uniquely Southern Contribution in the West to catalyse social innovation (Matupire, 2014). Within my REBIRTH framework, CoPs transcend by entering the womb to reconstruct issues of identity and respond in community together.

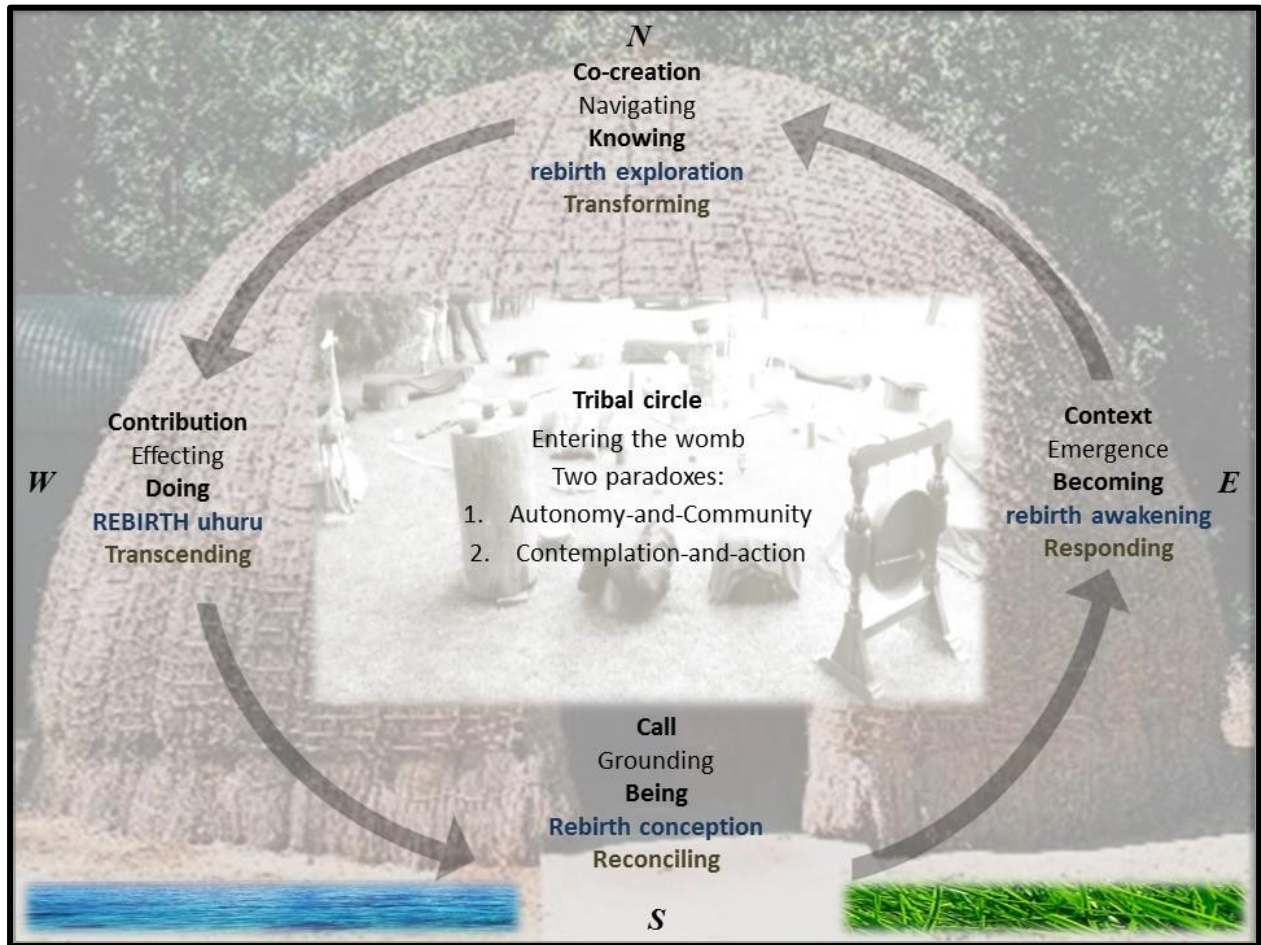
Being in a community leads to a healthy sense of belonging, greater generosity, better distribution of resources and a greater awareness of the needs of the self and the other. In this way, being part of a strong community strengthens one's individuality by supporting the expression and enjoyment of one's unique gifts and talents. Gafni (2001: 60) reminds us that the purpose of community is to care and nurture the soil of every person's unique destiny. Through engaging the REBIRTH framework therefore, the community embarks on the 4C integral journey and begins the journey from the South to ground to Call in identity, reconciling in humanity. This creates paradoxes in the tribal circle of autonomy and community as well as contemplation and action through one voice (Lessem et al., 2014). For organisational systems to perform, energy in the system becomes important. The concept of "Energy in the system to perform" refers to the following:

"...the collective human capital potential within the system that may manifest in positive, organisational indicators, such as motivation, safe behaviour, low turnover, low absenteeism, productivity and innovation. Scientific principles are applied to individual, group and organisational energy, and may be described as positive, neutral or negative. Individual, group and organisational "relationships oblige growth not regression, complexity not simplicity, and involve coming to terms with the tension of opposites which each party embodies."

-(Hollis, 2003: 90)

In relation to Hollis above, Figure 10.1 below, the REBIRTH framework is shown to promote an internal psychological and emotional development process toward letting go of the old and welcoming the

new. This generally creates dissonance in the system. It is thereby through reconciliation, responding, transforming and transcending that individuals, communities, organisations and society experience inclusive transformation.



**Figure 10.1:** The REBIRTH framework: Entering the womb: two paradoxes adapted by the researcher

The REBIRTH framework presented in Figure 10.1 above promotes resilience which signifies hope for future strategic vision, and thereby establishes a people and systems framework within which subjective experiences can be interpreted with meaning and hope, even in seemingly hopeless situations. This creates faith in the collective capabilities to work through the transformation journey and to successfully transition from the old to the new (Beck, 2008). This requires faith in the rebirth transformation journey to realise the importance of relying on community and each other to regain balance and to move toward inclusive transformation. An environment that supports rebirth as an organisational transformation journey through a healthy relationship practice is important. Resilience can be fostered through relationship, by engaging with all human capital, thereby to create an understanding of the transformation experience within CoPs (Fletcher, 2001). The gift of REBIRTH is therefore represented in this framework, and this gift informs my contribution.

The REBIRTH framework, Figure 10.1 above illustrates the integral nature of rebirth as transformation journey, as in embarking on the journey, communities ground through the relational Southern path of community and reason in contextualising identity through the lens of collective humanity. In reconciling to being, through the South, a rebirth conception is realised as an integration of letting go of the decomposed parts of self and other, perceived barriers, differences and imprisonment of

human discard is released towards reconnecting in humanity. The symbol used in reconciling to humanity is the drum which echoes the collective sound, rhythm and resonance of humanity in community. As identity is reconciled in humanity through grounding in the South, community emerges whole, and responds in community together in the East. Responding in community together therefore creates a rebirth awakening, and propels the being towards becoming. Through responding in community, the gong is used and symbolises time and its integral nature towards inclusive transformation. Through the authentic experience of awakening Context towards communal rebirth and responding in community together, the community engages a rebirth exploration and navigates to the North where collective communal issues are interrogated, unlocking knowing in diversity resulting in an experience of collective transformation. In this experience of collective transformation, the symbol used is the broom which represents sweeping away past imprisonments and embracing transformation as a rite of passage.

In reconciling (Being-South) and responding (Becoming-East) in community towards collective transformation (Knowing-North), the community is empowered to transcend (West-Doing) towards inclusive transformation in self, other, community, society and the larger world, catalysing social innovation in humanity and diversity (Lessem & Schieffer, 2009). The symbol used in transcending is the calabash of African wisdom. Through the experience of embarking on the 4C integral journey, a rebirth Uhuru is the effect. Throughout the journey, however, is the complexity of authentically holding the paradox of autonomy and community, contemplation and action, creating dissonance both internally within the human system and eight human aspects and externally without greater ecology.

With the authentic experience of embarking on the rebirth transformation journey relationship with self, other, community, society and the larger world is improved through the ability to transform inclusively and in an integral manner (Quinn, 2000) and (Wheatley, 2002). The rebirth transformation journey emphasises that the change process requires alternative methodologies and healthy ways for human capital to become resilient to transformation and change. Within the FNB Private Wealth Client-Servicing context, CoPs should have the psychological and biological strength required to successfully realise the importance of resilience and build trust relationships (Quinn, 2000).

The relationship practices in the rebirth transformation journey emphasise mutual growth and empowerment where vulnerability is recognised as part of the human condition and interactions are viewed as opportunities for personal growth for all concerned. Resilience is therefore crucial within the rebirth transformation journey and can be enhanced through the practice of caring relationships and embedding the integral human philosophy espoused through: I Care (Heart), I Can (Head), I Commit (Hands), embracing authentic being and becoming and birthing life energy in the human ecology.

## **10.7 Themes that emerged through engaging the rebirth transformation journey**

The following themes emerged:

1. The theme of identity through humanity grounding to Call to explore questions of purpose and existence through CoPs as relevant people form for creative transformation (Wenger, 1991)

2. The theme of inclusive transformation through uncovering Southern indigenous knowledge and wisdom
3. A theme of creativity and creating safe, open spaces to harness the spiritual quotient (SQ) and heart centre (Zohar & Marshall, 2000)
4. The theme of integrating both the masculine and feminine to engage whole systems, Heart, Head, Hands and driving inclusivity to catalyse social innovation
5. The South, its indigenous knowledge and norms as relevant science towards creating broader and deeper OCD transformational solutions for today's complexity (Viljoen, 2008)

Through embarking in the rebirth transformation journey, the key findings that emerged, and recommendations made to embed the ethos of, Care (Heart), Can (Head), Commit (Hands), within the case organisation FNB Private Wealth Client-Servicing will be discussed hereunder.

### **10.8 Summary of the key findings and recommendations to achieve the FNB 2025 vision within FNB Private Wealth Client-Servicing**

All the variables needed to formalise the idealistic state are presented in a systems framework. These variables influence and add to the accumulation of knowledge which is deposited in the organisational memory. These networks of relations that develop within strategic knowledge interactions improve the flow of information within the knowledge accumulation and rebirth function. Creative leadership and the availability of people resources are essential for the process of idea generation to take place amidst the ability to accumulate knowledge which hinges on leadership facilitation as a centralised direction, and by diffusing responsibility to the communities of practice most directly concerned. Leadership exchanges are based on the individual exchanges between people to expand their shared cognitive environment, and are constructed within knowledge.

FNB Private Wealth Client-Servicing must acknowledge that to remain relevant in this knowledge economy and ultimately towards reaching the FNB 2025 vision; customer service excellence and innovation through rebirth is fundamental. Increasing customer satisfaction will result in higher levels of job satisfaction of employees and shareholders. Growing shareholder satisfaction results in greater investments, which result in investments channelled to higher levels of learning and increases in remuneration. This leads to staff satisfaction, speed of delivery and quality, boosting customer satisfaction levels even higher. Increases in the levels of reputational capital learning drives experience and deliver a higher client service level. Increased learning opens higher levels of innovation, which in turn increases higher levels of learning and higher levels of integral development which impact directly on speed of delivery, quality and customer satisfaction. Increasing customer satisfaction decreases the level of competitive activity, as less room is available to make an impact on customers, hence improving the quality of relationships that exist within the new systems framework through rebirth towards the 2025 vision is crucial.

#### **10.8.1 The following recommendations are made:**

Increasing the quality of relationships within FNB Private Wealth Client-Servicing system through the following:

- i. Leadership should meet regularly with all staff in their areas in one-on-one meetings to gain a better and deeper understanding of each other on a personal and professional basis and to achieve outcomes collectively.

- ii. Forming alliances with key product suppliers and teeing into their strategic projects, client advisory boards and networks. Sharing knowledge and experience at an executive level to raise the leadership knowledge and experience by tapping into global practise. Partnering with all stakeholders on projects to enhance client experience.
- iii. Allowing CoPs to have direct contact with the client beyond the formal channel of project manager. Extending it as far as allowing for the team to be resident within the client's premises for the duration of the project. This will allow for client intimacy, higher job satisfaction and greater opportunity to learn more about the client, with closer contact point and tangible experience of making the difference to the client's life.
- iv. Utilising FNB's value system in regular feedback sessions to enhance the way in which people work with one another and stakeholders. CoEs of the rebirth transformation journey must meet regularly with clients to educate them and market their unique service available to them. The rebirth transformation journey can achieve increased reputational capital in an inclusive manner. Incorporating regular team-cohesion activities into project plans, staff get-togethers such as department days and strategy workshops.

Increasing the level of innovation through the following:

- i. Creating incentive schemes and rewarding innovation within FNB Private Wealth Client-Servicing. Recognising people who made a difference through utilisation of innovation to bring about quicker, higher-quality delivery and value-add to the client.
- ii. Replicating and entrenching these innovations into the larger system to ensure efficient implementation. Exposing the team to problem-solving and creative thinking techniques and encouraging its use.
- iii. Setting up focus groups to work on challenging areas for periods, and make this a way of life in FNB Private Wealth Client-Servicing, driving constant improvement and pursuit for excellence. Imperfect daily action leads to perfection.

Increasing the experience of staff through the following:

- i. Creating a supportive environment in which knowledge can be shared by means of setting up knowledge vaults by using Web 2.0 technology such as wikis, blogs, and collaborative workspaces for the various teams.
- ii. Developing focussed career plans integrating learning and development into the plans providing for job rotation and expansion to gain experience.
- iii. Investing larger sums of money into training and development and orientating newcomers to gain a better understanding of the systems in a shorter timeframe.
- iv. Adjusting selection criteria to focus on people embracing the FNB value system with a strong focus on the value of continuous learning and the competency to learn as well as the willingness to share knowledge.

### **10.9 Contribution of REBIRTH and the rebirth transformation journey to drive inclusive transformation in today's complex organisational landscape**

The rebirth transformation journey is designed to cause a repurposing of self, other, community, society and the larger world and embrace the gift and latent power in engaging authentic identity and the gift of *Botho-Ubuntu*. REBIRTH as a Southern value proposition proposes a relevant

transformational frame to cause inclusive transformation. It is also designed to present a new rebirth science and lens for leadership being and becoming, raising leadership consciousness and inculcating maternal African leadership methodologies deployed in the rebirth transformation journey towards inclusive organisational change and development and offering an integral vision of Africa through its inherent wisdom in diversity.

I propose the rebirth transformation journey as strategic organisational and leadership tool towards inclusive transformation both within the case organisation FNB Private Wealth Client-Servicing as well as within the larger transformational ecology. In engaging the rebirth transformation journey, I seek to reconnect the world to the gift of humanness as asset for navigating complexity in today's transformational landscape. Embedding organisational learning through rebirth transformation journey becomes important to drive social innovation, reclaiming the Southern relational path grounded in community as authentic, legitimate lens toward inclusive transformation.

The rebirth transformation journey also seeks to create liberating structures in identity and harness the gift of diversity wherein humans can thrive and flourish; thereby creating sustainable mental shifts in leadership thinking embedded in the Southern norm of *Botho-Ubuntu*. It is through the rebirth transformation journey that platforms for authentic voicing are created. I therefore explore inclusive ways of transforming ecosystems in organisations; birthing unity through community; unlocking the value proposition of REBIRTH as transformational journey and thereby birthing a new Southern value proposition.

### **10.9.1 Addressing research questions and objectives**

As positioned earlier in Chapter 1 of this thesis, three research questions were identified to understand the impact and observed objectives of organisations embarking on a REBIRTH. Below are the three questions set and objectives.

#### **10.9.1.1 Research questions**

- i. How can organisations re-engage the conversation of identity as relevant for today's transformational discourse?

The 4C integral journey as coined by Lessem and Schieffer (2009) is towards the four human modes being, becoming, knowing and doing within the Four Worlds perspective. Each of the four human modes represents the humanistic South, the holistic East, the rational North and the pragmatic West (Lessem & Schieffer, 2010). Organisations can re-engage the conversation of identity as relevant for today's transformational discourse by acknowledging that organisations comprise of human beings and in human-being-ness, is a soul which exists beyond natural seeing, knowing and doing (Nussbaum et al., 2010). It is therefore important for those leading organisations to lead first from the being towards becoming for knowing and doing to emerge whole (Nussbaum et al., 2010).

Organisations therefore, are first human souls before they are human capital and for organisations to effect transformation in an inclusive manner, constructs of the Da Vinci Institute TIPSTM framework need to be informed first from a human-being-ness which is the heart centre and innate gift of *Botho-Ubuntu* instead of the traditional North-Western perspective of human capital which represents the hands and head as core aspects taking a mechanistic and automated view to humanness and thereby

nullifying identity in humanness as the core, and creating death discard and disconnect within the human ecology (Khoza, 1994).

Embarking on a REBIRTH transformation journey framed within the 4Cs of integral research, enables organisations to re-engage the conversation of identity in an authentic and inclusive manner as the four inner and four outer worlds of human being and becoming are explored through Lessem and Schieffer's (2010) GENE. The GENE represents grounding in the South in our being, emerging in the East towards becoming, navigating to the North in knowing and effecting to the West in doing (Lessem & Schieffer, 2009); Nussbaum et al., (2010).

Through the Southern relational path of community, we ground to call in identity as humans (Lessem & Schieffer, 2010). The conversation of grounding in identity therefore becomes a burning platform and foundational tenant from which organisational transformation may be facilitated in an inclusive manner (Viljoen, 2008). Organisations can therefore re-engage the conversation of identity as relevant construct for today's transformational discourse by embracing the criticalness of reframing current transformational processes and locating them first within the context of identity as it is through the lens of grounding in identity ecologically within self (I), other (We) and organisation (Us), to interrogate questions of existence holistically that inclusive transformation catalysing social innovation may emerge (Viljoen, 2015). This may require the organisation to have the courage of embarking on its 4C integral journey and in so doing engage both the four inner and outer worlds, thereby dare to rebirth its purpose and reason for being (Adodo, 2016). The conversation of identity is crucial for today's transformational discourse as it is an element which grounds us back to our humanity which is key as frame that may not only continue man's evolution, but an evolution that may systemically and sustainably enable us to navigate the complexity of the current industrial revolution (Khoza, 2005).

ii. What process can result in connecting of identity to drive inclusivity?

The REBIRTH transformation journey is such a process which results in connecting the identity to drive inclusivity. This is facilitated through grounding to Call in identity through the Southern relational path of reason and community (Lessem & Schieffer, 2010) and Mbigi (1997). Through this path, communities engage the issues of identity through the lens of *Botho-Ubuntu* and collective humanity and in the stories and the resultant journeys of collective lived experiences, reframe collective and shared understanding of identity, thereby fostering inclusivity (Mbigi, 1997); Viljoen (2008).

iii. What meta-insights can be derived in implementing a REBIRTH journey?

The following are some of the meta-insights derived in implementing a REBIRTH journey:

Organisations comprise of humans, and therefore organisational being and becoming need to be framed from this lens as starting point (Lessem & Schieffer, 2010). Human beings within organisations have eight human aspects which influence their being-ness, it is therefore important for organisations to create strategies, technology, systems and processes which enable and equip these human aspects to emerge and integrate their value in the way organisations reward and recognise performance (Everest, 1991 as cited by Viljoen, 2008). Human beings are heart before they are head and hands, organisations therefore need to inculcate creative open spaces where human aspects may be authentically engaged to flourish and thrive, thereby facilitating engagement of those human aspects to drive innovation (Quinn, 2000).

For organisations to inculcate a culture of inclusive transformation, they need to embrace the inner and outer Four Worlds as relevant as inclusive transformation begins with the being, grounding in the Southern relational path of community ensconced in the gift of *Botho-Ubuntu* (Matupire, 2014); Adodo (2016). Inclusivity begins in the being, and effects in doing; not the other way around as has become organisational norm (Viljoen, 2008). Inclusivity is framed through the African womb, engaging the heart of *Botho-Ubuntu* which connects to spiritual eye (SQ) towards integration of other human aspects. The journey towards being, becoming, knowing and doing is a GENE, 4C journey of sense making through stories shared (Nussbaum et al., 2010) as adapted from Lessem and Schieffer (2009). Stories are an integral part from which identity may be framed and in so doing, humans give themselves permission to engage the gift of inclusivity through diversity (Senge, 1990). Through sharing authentic stories, a safe container for human being-ness and becoming is constructed resulting in sustainable OCD process (Wheatley, 2005).

Transformation and innovation therefore are birthed as human being and becoming are authentically grounded in identity, integrating eight human aspects (Quinn, 2000). Africa is a place of our humanness premised on the heart quotient and the spirit of community (Lessem, 2001). Africa with its rich norms and gift of diversity has something to offer towards building OCD frames which are inclusive, catalysing social innovation (Senge, 1990); Khoza (1994). *Botho-Ubuntu* is a healthy construct from which to drive inclusive transformation, catalysing social innovation towards future sustainability (Matupire, 2014). A healthy organisational culture is thus influenced by a solid sense of shared identity that is inclusive (Viljoen, 2007).

#### **10.9.1.2 Research Objectives**

- i. Understanding how the conversation of identity can be re-engaged to facilitate inclusivity

The conversation of identity can be re-engaged to facilitate inclusivity by acknowledging that in humanness, we share communal being and in communal being-ness, authentic identity is framed, thereby creating a space for inclusivity up-front (Lessem & Schieffer, 2010). *Botho-Ubuntu* therefore grounds us to our original self, connecting us to our humanity and our oneness (Mbigi, 2005). Identity grounds us to both our individual and collective Call through sharing our individual and collective stories and thereby creating a safe space for communal engagement and rediscovery of our oneness through sharing of our stories (Mbigi, 1997); Viljoen (2008). In sharing our stories, we discover our commonality and diminish our differences, thereby opening a safe space for inclusivity to emerge (Wheatley, 2005). Grounding in identity empowers us to embrace what is authentically and organically ours being the rich indigenous knowledge of the South, and grounds us to explore the value in this indigenous knowing as an important aspect of experiencing our whole being (Lessem & Schieffer, 2009). This locates our understanding of life through the lens of the South first, grounding us to the local, indigenous, expanding into the global exogenous and knowing thereby creating inclusive understanding of our world (Khoza, 2005).

- ii. Deriving a process of transformation for healing

Through the experience of embarking in the rebirth transformation journey, organisations and the people which form the core of the organisation are invited to embark on a journey of transformation that is deeply human as the core design is deeply human. In embarking on an OCD journey that begins in the South, a place of humanity and community, a sense of inclusiveness is created which when fully engaged, manifests in healing (Viljoen, 2015). The notion of rebirth subconsciously created an

expectation of a cathartic experience between life and death and in starting the journey by grounding to the South, through the construct of *Botho-Ubuntu* and the spirit of community and through existential stories shared, a new consciousness and deep understanding of communality through humanity is uncovered, creating upfront an unspoken experience of healing as the community uncovers both individual and collective Call and that in the Call, lies identity and not in the interpretation or perceptions of our stories (Mbigi, 1997); Viljoen (2008).

Engaging a 4C integral journey which grounds first in identity, empowers people to embark in the rest of the journey whole in identity and Call as starting point (Lessem & Schieffer, 2010). Knowing and owning a healthy sense of identity in community are inclusive, and can be deeply healing (Viljoen, 2008). Using African practices and rituals in the process such as story-telling, dance, community, tribal circle, nature, reflection and leveraging the philosophy of *Botho-Ubuntu* not only grounds the community in ancient wisdom but reconnects to oneness in identity, engaging the gift of identity (Lessem et al., 2013). In embracing one's identity, there is freedom, and in freedom, there is healing (Adodo, 2016). Within the rebirth journey, the tribal circle representing the rebirth womb creates a meaningful experience through oneness. In working through the experience of going in and out of the womb, a healing that is deeply rich and communal emerges. This experience of healing begins to uncover our sameness in humanity and community thereby nullifying perceived illusions of the decomposed parts of the individual and collective life experiences (Laubscher, 2013).

iii. Deriving meta-insights into healing organisations through REBIRTH

The following meta-insights can be derived in implementing a REBIRTH journey:

Organisations are Human before they are systems, and therefore need organisational frames that ground in humanity first working from within into the external. Inclusivity and organic transformation are birthed and made sustainable when working from the heart centre instead of the head, and therefore organisational being and becoming inform the core of organisational soul and psyche rather than organisation knowing and doing (Lessem & Schieffer, 2009).

Organisations need to engage the conversation of being and becoming as acceptable praxis towards informing the knowing and doing, thereby creating safe organic spaces for inclusivity, catalysing social innovation (Senge, 1990). Organisational soul is seeded in the human being and cannot be driven, it must emerge (Best, 2010). A healthy organisational soul is crucial for a healthy organisational culture, and healthy culture is a foundational tenant for sustainable innovation (Lessem & Schieffer, 2009).

Africa, its indigenous wisdom and rich philosophy of *Botho-Ubuntu*, needs to emerge and have a presence in today's organisational OCD and transformational frames for inclusivity and sustainability to be realised (Jackson, 2004). Africa has a fresh and unique perspective to offer which is holistic and integrates, enabling organic sustainability and evolution into the future, thereby organically informing today's complexity. African rituals as transformation tools ignite human energy in form and when grounded to Call, create a unique journey towards inclusivity. REBIRTH creates a holistic, deeply meaningful healing experience, a sense of new life which creates healthy organisation soul.

**10.9.2 In answering these questions, I also set out the aim and unique contribution of this thesis in the field of study as follows:**

Through the first research question, I am propelled to reflect on the richness of an African proverb which says: "The tar of my country is better than the honey of other countries." This thesis espouses

to add a richer and larger layer of African norms embedded in *Botho-Ubuntu* and community as a relevant science to add traditional African indigenous knowledge to drive inclusive transformation within the existing broader transformational circumference (Jackson, 2004). It highlights the power of voicing through story-telling, innate gift of listening and value of hearing from oneself, to other, community and the larger world as integral to ecological organisation being (Tuwe, 2016); Chinyowa (2001). Furthermore, Tuwe (2016) states that it is crucial to acknowledge and present African research methods and methodologies that reflect the beliefs (Ngugi wa Thiong'o, 1986), values and rituals rooted in African societies.

The thesis shares values latent in engaging the Southern narrative ensconced in community and diversity inherent within the human spirit as valuable frame towards inclusive transformation (Viljoen 2008). These are practical Southern tools which reconnect to identity and when engaged with integrity within organisations, harness the richness of African wisdom latent in the gift of story-telling. Story-telling reconnects to identity and is an organic process of reconnecting one to self and the whole (Lessem et al., 2013).

In response to the second research question, the contribution of this thesis towards greater knowledge creation is REBIRTH as solution towards organisational change and development premised in the Southern relational path of community and essence of *Botho-Ubuntu*. With the philosophy of *Botho-Ubuntu*, Africa should show and lead the rest of the world. Rulini (2007: 45) states: "We have love of God, love for one another, and bringing to ourselves and the rest of the world music, sport, arts and other forms of expression which bring out the best of the human spirit and connects people across the boundaries of material life."

*Botho-Ubuntu* is a humane and inclusive philosophy of life, and therefore it is at the core of the rebirth transformation journey grounded in the Southern relational path of community (Chitumba, 2013). REBIRTH within the context of this study is framed as an organisational transformation journey within integral research, which becomes my unique contribution to the field of study which offers new knowledge towards inclusive transformation. It encompasses enterprise and economics, designed to create a holistic transformational journey grounding self, other, community and the larger ecology in identity (Lessem & Schieffer, 2014).

I capture this journey as relevant in today's complex world in informing a new narrative towards inclusive transformation (Viljoen, 2008). I uniquely position the rebirth transformation journey, and highlight its contribution to drive ecological transformation in today's complex business climate as relevant for integral organisational communities as I respond to the third research question. Through this thesis, I share a Southern perspective for transforming organisational ecosystems in an integrated manner resulting in evolution of transformational practices and catalysing social innovation.

Through the thesis, I demonstrate that when organisational communities engage authentically and ground in identity, integral human aspects and potential are unlocked (Quinn, 2000). This transforms way of work, increasing levels of engagement. I therefore demonstrate the value of locating work in purpose as driver for organisational learning and the meta-insights thereof (Viljoen, 2008). Transforming environments in an inclusive manner requires organisations to connect with people at a human level; this is the gift of the South, relevant as transformational tool for today's complex business landscape (Collins, 2001).

The South has value proposition to bring towards existing transformation models, this value is captured in traditional norms of identity in community, catalysing social innovation (Viljoen, 2008). This solution proposes that it is time for individuals, communities, organisations and society to reclaim authentic identity towards being and becoming. This solution suggests that the South is positioned to re-engage what is authentically Southern into the larger world to ground the divergent transformational landscape towards inclusivity (Viljoen, 2008). As transformation journey, REBIRTH as the solution takes self, other, community and the larger world into a cathartic experience of death through interrogating sub-conscious conditioning and the impact of lived experiences to reframe a new narrative towards inclusive transformation. Hailey (2008:14) states:

“...in Tutu’s eyes, Botho-Ubuntu means that in a real sense even the supporters of apartheid were victims of the vicious system which they implemented and supported. The lesson for those concerned about building community cohesion is that the spirit of Botho-Ubuntu has a role in healing of breaches, redressing imbalances and restoring broken relations. It helps communities avoid destroying themselves in their search for retribution and punishment of the perpetrators.”

This REBIRTH is premised and grounded in Southern norms of *Botho-Ubuntu*, and purports that the South has intrinsic value to give towards today’s global agenda of transformation and this value is deeply rooted in the essence of the human spirit. The South, in this case, represents Africa (Lessem, 2001). I propose in this thesis that Africa should re-engage her feminine identity captured in communal spirit as relevant science for today’s transformational agenda. Africa should re-engage a new narrative to REBIRTH identity in diversity towards inclusive transformation. Africa has latent knowledge to impart towards the global agenda of transformation, and the season for reclaiming her voice to cause spiritual ecology and inclusive transformation is now. REBIRTH works with feminism and its impact towards driving leadership effectiveness and deepens the experience of this transformation journey through PAR, heightening team engagement and strengthening CoPs and latent diverse talents.

Uhuru is a Swahili word meaning, freedom. I believe through the rebirth transformation journey and the testing of the research applied within FNB Private Wealth Client-Servicing, a traditionally white, patriarchal, predominantly digital thinking organisation influenced mostly by Western leadership models and rooted in capitalist consciousness created significant shift in paradigm thinking effecting ecological transformation. A rebirth Uhuru is realised when a solution to turn around a core BU within FNB Wealth becomes the rebirth transformation journey grounded in the Southern relation path of community and anchored in the essence and Southern value preposition of *Botho-Ubuntu*.

#### **10.10 The Challenge and Complexity of organisations requires integral transformation**

We are at a turning point in history where political, social and financial realities of this world will be confronted with the danger of extinction if a mind shift does not action and manage relationship with our communities and the larger environment. Rebirth therefore addresses the global economy towards finding integral solutions and questions current human relationship with nature and the larger environment; human relationship to this earth is sacred as it is the only place that we can call home.

Rebirth also questions the political, economic and social systems toward alternatively finding methods of engaging and allowing all voices in our diverse communities to be heard (Toffler, 1980). Africa is a

land of diverse cultures that survived; and still advances together with ever increasing stamina and creative ideas (Mbigi, 1995). Mbigi (2005) states that the notion of *Botho-Ubuntu* transcends a powerful sense of community and covers core values of African leadership being: respect and dignity of others, solidarity of the group, team work and services to others in a harmonious and interdependent spirit.

As part of rebirth, FNB Private Wealth Client-Servicing consultants were taken through a learning process in terms of innovation to help them become more efficient with idea generation and more importantly, to be more effective with implementation of ideas. This proved to be an immense learning for these consultants, and gave them career access to the greater FNB business. In summary, FNB Private Wealth Client-Servicing went from being an area that had hardly submitted innovations before, to an area that managed to put forward over 200 innovations and in 2013 won an award at the FNB Innovations Awards Evening as depicted in Figure 10.2 below illustrates the award given to Wealth.



Figure 10.2: FNB Private Wealth Client-Servicing Innovation Award (2013)

Figure 10.2 above is proof that connecting to oneness towards achieving communal objectives through inclusive transformation, can lead to social innovation (Lave & Wenger, 1991). Within FNB Private Wealth Client-Servicing, this award signifies the value which innovation can add to an organisation and its clients. What became evident in rebirth was that people accountability and group values became entrenched in each consultant within FNB Private Wealth Client-Servicing who went through rebirth. This meant that while the team was working towards enhancing and improving the business, they were nonetheless also cognisant and masterful in ensuring that appropriate care and regard was given to industry governance and risk regulations.

The rebirth transformation journey promotes strategic thinking as a process of envisioning the future with the intention of identifying opportunities and possible threats and positioning the business to be successful in that environment. From this vision, leaders will then be able to set a vision, mission and strategy for Client-Servicing. Empowering others means involving people in the learning process which gives all employees a stake in the future of the company. Leaders are then enabled to develop people on all levels of the hierarchy to participate in decision-making towards the collective future and lead the culture toward inclusive transformation (Viljoen, 2015). There is no doubt that rebirth resulted in FNB Private Wealth Client-Servicing being able to meet and exceed its stated objectives, and in so doing could grow their technology, systems, innovation and people for the greater good and benefit of FNB Wealth and indeed of First National Bank towards the 2025 vision.

To choose life could translate to building a life-sustaining society where people are regarded as the planet's greatest asset and collectively develop respect for all sentient and non-sentient beings. Khoza, 2005 states that the expansive transcendental and centrifugal, African humanism or Botho-Ubuntu will contribute significantly towards growth of organisations. The difference between the Western and African notion of humanism is that the Western emphasises individualism (Khoza, 1994), while the African focuses on the community (Matupire, 2014). A sustainable society is one that satisfies its needs without jeopardising the prospects of future generations (Wheatley, 2005).

In contrast to the Industrial growth society, a new life-sustaining society should have the caring capacity to support people resources in the corporate and private world. Today's leaders should be focused on the value and engagement of people to bring about a mind-set change at a deep psychological and spiritual level (Kets de Vries, 2001). For organisations and leadership to immerse in harvesting the richness carried in the spiritual quotient (SQ) social innovation as a new and unique value proposition must be unlocked into the future (Khoza, 2005).

#### **10.10.1 A Southern leadership perspective to manage people more effectively – The rebirth transformation journey**

Rebirth is strategically used to address the diverse science of change and people management within FNB Private Wealth Client-Servicing and interrogates current perceptions toward growing and becoming positioned as the preferred service provider within the highly competitive financial and banking sector. To implement these changes effectively, the mind-sets of FNB Private Wealth Client-Servicing consultants and leaders need to be altered towards a more inclusive and resilient culture. The resilient culture is imperative and could be achieved by changing the style and focus of the leadership team in FNB Private Wealth Client-Servicing.

The leadership style to be adopted should display qualities within a rebirth paradigm where people awareness, transparency and involvement will be paramount for introducing change, and ultimately

for creating an ownership culture and collective responsibility in FNB Private Wealth Client-Servicing. The first step to changing the internal perceptions of FNB Private Wealth Client-Servicing would be to make leadership more aware of the strategic importance of resilience; the value of the rebirth transformation journey and the inclusive transformation process which it underwrites.

Khoza (2005, cited by Matupire, 2014) argues that the locus of control for Africa's future is within the continent itself and that the African renaissance will be driven by leadership that in the African spirit of *Botho-Ubuntu*, will keep people in authority always mindful of their role as servers rather than commanders. The server leader leads by the tenets of consultation, persuasion, accommodation and cohabitation, and shuns coercion and domination. African humanism, he argues, promotes social cohesion through its search for sufficient consensus that leads to a process of social arbitrage in settling of differences. This leadership paradigm is practical and compassionate, and it calls for the development of leaders who can deliver rather than merely promise, and who demonstrate great personal integrity, supported by expertise and organisational ability.

The rebirth transformation journey also links the various business units within FNB Private Wealth into an ecological enterprise. It is thus through leadership support that resilient people can then become owners of FNB Private Wealth Client-Servicing and negotiate the FNB 2025 vision as an urgent priority. When attempting to form a picture of the future of the FNB 2025 vision, the previously accepted mind-set regarding the management of people no longer serves the rapidly changing financial industry. The financial industry is currently facing radical changes, and requires those employed within it to think and innovate beyond the schematic frame of its mental traps (Morgan, 2000). Throughout the Rebirth transformation journey, the deeply seated personal and organisational mental models have become out-dated rather than enhancing the capacity to deliver the FNB 2025 vision effectively.

Leadership can achieve an innovative approach for integral people management, and thereby combine diverse realities within a determinate realm of emergence. Within this supposition, the imperative is to improve a resilient culture and thereby nurture the rebirth journey within FNB Private Wealth Client-Servicing. Integral leadership lenses propose new people-based themes to investigate the current situation within FNB Private Wealth Client-Servicing to thereby recognise the assumptions that shape the current view of cultural reality. This is imperative for improving the current strategy regarding people resilience as paramount to remaining competitive and achieving the FNB 2025 vision.

#### **10.10.2 Leading of people**

Managing people is an essential element for reframing the consciousness towards achieving superior client experience and delivery to achieve the capacity to embody complexity. This capacity could drive the capability to generate diverse ideas and skills with spontaneous purposeful originality, and thereby to action a different level of emotional maturity and understanding of people within FNB Private Wealth Client-Servicing. The current leadership in FNB Private Wealth Client-Servicing has a mandate for facilitating growth through engaging new methods for the facilitation of collaboration within both the internal clients of the bank and external client relationships. This is the key strategy for managing people and leadership need to interrogate this strategy and question how it will facilitate this Integral Research Approach successfully to redirect current mind-sets.

The current cultural status is influenced by a lack of strategic vision, where employees are restrained and therefore disengaged within a paradigm which lacks knowledge sharing and results in hostility and mistrust within this critical business unit. Achieving leadership and managerial effectiveness

involves continuously developing people skills and the Rebirth transformation journey as such drives collective consciousness and therefore promotes skills for recognising challenges, interpreting information, accessing validity for flexible decision making and creative thinking to move the organisation towards the realisation of the FNB 2025 vision. Skills that originate from learning, experience and being able to take initiative forward are important.

Rebirth develops open and trusting relationships with leaders, colleagues and communities who add value collectively to learn to listen and collaborate. This aspect of Rebirth could drive leaders to create climates and cultures within which people become self-motivated with efficient communication skills to analyse and manage interpersonal and intergroup relationships. Rebirth thus drives effective conflict management skills to influence without formal authority and lead collectively towards the FNB 2025 vision (FNB Private Wealth Client-Servicing Report, 2014). The people manager's job is complex and requires a high-level of problem-solving skills and techniques, particularly the efficient time management to develop mutual understanding of the organisational culture and emphasises the role that best suits the situation, and the perception of the cultural demands and constraints (Viljoen, 2014).

People managers should develop more latitude and commitment to gain insight and take responsibility for an inclusive transformation journey where all human voices are included (Field, 2000). Self-confining thoughts regarding people management could be the greatest barrier to integral people development which also prohibits the embedment of creative thinking to advance and anticipate the evolution of new futures. Although many organisations believe that corporate culture is built around patterns of shared thoughts, beliefs and meaning, there could be great merit in recognising and rectifying the prison-like qualities that are still practised in a time of expanding global consciousness (Wilber, 2000). Organisational culture is considered a critical contributing factor for the establishment of people forums where elders in rebirth can meet to discuss integral people development. The degree to which the rebirth journey is promoted impacts directly on leadership to drive a mature culture that appreciates integral value to move beyond the current worldview and reverse engineer the future (Zohar, 2004).

An integral people vision is urgently needed for providing an improved customer focus through collective interpersonal relationships. The rebirth journey addresses cultural values and norms that influence people management and this should be promoted through organisational knowledge, strategic future perspectives, purposefulness and trust relationships (Wilber, 2000). This can furthermore promote and encourage the advancement of integral people systems. The corporate environment in FNB Private Wealth Client-Servicing needs to become more tolerant of people generally, and thereby advance open communication channels to become dedicated to support integral leadership approaches in servicing (Zohar, 2004).

Openness and integrity can be acquired through the rebirth journey to facilitate an improved openness and engagement with leaders to support the transformation process amidst the increasingly complex and ever changing economic and emergent eco centric environment (Field, 2000). Rebirth promotes resourceful leaders who are secure in ancient knowledge and the belief that they are future mentors in an integrated society with a vision of an integral world. Current mental models and organisational beliefs regarding the development of people, no longer fit the changing economic environment. When attempting to form a picture of integral people development, previously accepted

routines become rigidities and obstacles, and no longer serve a rapidly changing global village where rebirth acts as strategy developer to achieve inclusive global transformation (Wilber, 2000).

### **10.10.3 Organisational culture as a critical tenant within rebirth**

The successful implementation of a resilient people strategy will require a complete transformation of existing corporate culture as this is fundamental for the formation of additional information and communication flows and the success of the rebirth transformation journey. Symbols, stories and archetypes play a significant role in the establishment of organisational culture and inclusive cultures are characterised by definitive patterns and processes, which influence the attitude and behaviour of employees. Bhengu (1996:50) states that, "a primary characteristic of African 'being' as *'umuntu'* is its inclusiveness. *'Umuntu'* means all humans not only African humans." The development of flexibility, adaptability and change resilience in individuals and organisations will remain a continuous challenge, as organisations strive to be emergent and fluid in their strategic behaviour (Kets de Vries, 2001).

Culture provides direction by presenting guidelines and expectations for individual and team dynamics and it defines the key value system of the socialisation process where all members are included into the corporate culture (Martins & Martins 2002). Culture is dynamic, and reflects FNB Private Wealth Client-Servicing's capability towards future growth and interaction with the larger financial community (Viljoen, 2014). Organisational culture is an important contributing factor towards the establishment of a servicing knowledge forum. The degree to which creative and innovative behaviour is promoted among knowledge workers, impacts directly on its leadership and cultural success.

Quality and culture are inextricably intertwined within organisational culture to effectively promote creativity and innovation (Lessem et al., 2014). There also seems to be a paradox whether culture promotes creativity and innovation, or whether it is merely an obstacle to promoting innovative behaviour (Morgan, 2000). A culture, thus a system of shared meanings, may guide the way in which organisations act and the way in which individuals view and interpret the corporate world (Novinger, 2001a). The Conference Board of Canada (2006: 3) defined Employee Engagement as, "a heightened emotional connection that an employee feels for his or her organisation, that influences him or her to exert greater discretionary effort to his or her work."

The Rebirth transformation journey questions the crucial value of culture, and indicates that leadership can influence culture towards the advancement of higher creativity within an organisation. The dimensions of creativity could be synthesised within a new strategic vision creating enhanced customer focus through interpersonal relationships, more committed and resilient leadership. The cultural values and norms that influence creativity and innovation as shown by Martins and Martins (2002) are organisational knowledge, strategic future perspectives, purposeful and trusting relationships. This encourages leaders to draw forward new innovations in the working environment to improve customer orientation and tolerance for mistakes and open communications that finally support all knowledge workers in FNB Private Wealth Client-Servicing.

It is also important that openness and integrity create flexibility and autonomy which need to be promoted through the rebirth transformation journey (Martins & Martins, 2002). Creative leadership through rebirth could enhance creativity to support organisational idea generation, where knowledge is automatically shared. The sharing of incremental ideas for people improvement may be considered a minimal risk activity while sharing radical ideas may carry substantial risk which suggests that creative ideas are available in organisations, but the culture determines the willingness to share. The

socialisation of knowledge is an essential component of the new leadership paradigm as it promotes the engagement of people as an important building block towards inclusive transformation.

The rebirth transformation journey promotes strategic thinking as a process of envisioning the future with the intention of identifying opportunities and possible threats and positioning the business to be successful in that environment. From this vision, leaders will be able to set a vision, mission and strategy for Client-Servicing. Empowering others means involving people in the learning process which gives all employees a stake in the future of the company. Leaders are then enabled to develop people on all levels of the hierarchy to participate in decision-making towards the collective future, and to lead the culture toward inclusive transformation (Viljoen, 2015).

Inspiring and motivating leaders empower and enable an understanding of spiral dynamics to inspire employees through their actions and leadership skills, and thereby to form role models to follow (Laubscher, 2013). Leadership needs to motivate and steer the culture towards a direction as the rebirth transformation journey includes managing and promoting diversity and cultural flexibility to develop leaders to impact the functioning more efficiently in an environment of cultural diversity to become skilled, and to respect others by displaying tolerance for cultural differences and understanding these differences. Leadership needs to become skilled in both verbal and non-verbal communication; read body language and diffuse conflicting situations (Martins & Martins, 2002).

Coaching and development enable leaders to act as mentors in enabling spiral dynamics, and this serves as an excellent method of coaching and guiding teams, and thereby to advise employees on development towards achieving goals collectively. Resilient leadership take personal interest in the development of people to achieve their full potential and provide constructive criticism by assisting with inclusive development and transformation. The need to improve the management of people within the culture of FNB Private Wealth Client-Servicing from traditional Newtonian consciousness to a new future vision is important, and this demonstrates an appreciation for resilient leadership and inclusive transformation (Makwe, 2003); Viljoen (2014). Below I will present the delimitations of the study.

#### **10.10.4 Delimitations of the Study**

While the study by its nature is fertile ground for further research, I was faced with challenges in employing integral research approach brought about by a large quantity of notes from my pre-post intervention investigation and analysis records which had to be entirely analysed (Viljoen, 2008). The analysis therefore became disorganised, as data could not be easily classified into neat categories or themes. Furthermore, within the case, I experienced numerous challenges, and the key challenge was that of taking a qualitative integral approach. This challenge was brought by people not understanding what phenomenology in the context of integral research was and thereby expecting parameters used in conventional quantitative research to apply. Thus, from the aforementioned; the following could be identified as delimitations of the study:

- i. Current accepted norm of North-Western models and transformational frames as credible and mostly looked to as primary sources for implementing solutions
- ii. Lack of sufficient transformational frames and models from the South
- iii. Not sufficient recorded data on the value of integrating indigenous knowledge and African practices or philosophies in driving inclusive transformational practices

- iv. General perceived notion of the South as inferior and not having much to offer towards ecological transformation
- v. Constructs of *Botho-Ubuntu* and humanity perceived as intangible and non-measurable
- vi. The South African reality of historic legacy and unconscious biases grounded in Apartheid legacy which fundamentally begins from a place of separateness, and is ill-prepared to fully embrace identity from a unifying lens of humanity
- vii. The relational path of community and reason inculcating Southern *Botho-Ubuntu* versus the western frame of self

The above delimitations unlock opportunity for further study in all the above-mentioned areas. Through embarking on the journey of re-engaging identity through the Southern relational path of community, my hope is for Africa to reconnect to identity and be taught from the cradle of Africa as the proverb by the Akan of Ghana states, “wisdom is not bought.”

REBIRTH as a concept and construct towards sustainable OCD practices is relatively unknown and therefore requires substantive theoretical basis to support its validity. REBIRTH as a construct is open to interpretation, and runs the risk of being misinterpreted as lacking scientific basis as it hinges significantly on ethnography and synthesis of individual journey’s, and people can be fickle which may create a risk of intangibility. REBIRTH is grounded in feminist theory (Anderson & Taylor, 2009) which allows organisations to creatively explore working with the feminine aspects towards organisational being and becoming. This creates an experience of healing through REBIRTH as it challenges patriarchal structures and their capacity to heal in an inclusive manner.

African indigenous wisdom lies mainly in the SQ while organisations operate mostly from the head domain being IQ. Equipping and supporting organisations for understanding the value in operating from the SQ is more challenging than running the process itself. It requires a lot of investment in time and energy getting stakeholder buy-in at the risk of investment in the process and embedding it. Leadership commitment therefore may be a challenge initially impacting resource allocation and developing credibility up-front on the perceived value of the process and thereby risking its efficacy.

There is not sufficient empirical data which substantively demonstrates successful implementation of OCD processes premised and grounded in the Southern relational path of reason and community. The level of complexity and change taking place within organisations undermines the long-term effectiveness of such a process as it hinges on leadership style, and with most leadership not understanding the innate value of long-term sustainability which comes from a process of this nature. Change in leadership can practically cut the process midway risking the value of the work invested to make it work and impact in human dynamics, breaking trust, continuity and sustainability (Matupire, 2014).

Healing organisations through REBIRTH is an evolving human experience and thereby begets evolution in the organisation through engaging the soul and heart centre as core. In engaging REBIRTH, people emerge whole as the process engages the whole brain and empowers people not only to ground to Call in identity, but also to engage the whole being which is a healing experience as humans are encouraged to be human and not parts within a system (Best, 2010).

### **10.10.5 Quality criteria**

In Paragraph 10.3, I presented IRA as a qualitative research method and as a qualitative researcher, I attempted not to simplify what I observed and experienced but, channelled more effort into recognising that deploying rebirth and its experience is multifaceted and thus, portrayed the process in its various forms. As presented in Chapter 6 of this thesis, data quality deals with the reliability and validity of research findings and outcomes based on how I ensured the quality of data used. The data quality was based on Glaser and Strauss's (2007) quality criteria for judging quality of studies being actual strategies applied in data collection, coding and analysis.

Triangulation as a means of gathering data through different data gathering methods as listed in Figure 6.1 to reveal findings was used. Furthermore, data triangulation as a technique to provide multiple perspectives on a problem with discrepancies between data sources, being themselves 'findings' was also used as a strategy for improving reliability of research findings as methods converged which ensured fit and relevance (Makangira, 2015). Fit of participants, credibility, originality and relevance also formed part of the criteria for evaluating my research according to Charmaz (2006) and Glaser (1978), and will be discussed hereunder.

Since data fit according to Glaser (1978) demands that the theory must fit the world it seeks to analyse, in this research, Shannon supported me in identifying FNB Private Wealth Client-Servicing consultants with whom I could engage as research participants being the CoPs and ultimately, my PAR team. It is through Shannon's support that I could identify the correct mix in terms of the community's demographics and the diversity composition as she was a team-leader and thus familiar with all the consultants within FNB Private Wealth Client-Servicing.

According to Botha and Schutte (2003), credibility in qualitative research aims at creating trust, respect and accountability. To ensure credibility in this research, I used auto-ethnography, listening survey and community engagements to encourage authentic story-telling of lived experiences. Furthermore, my use of an external observer such as Dr Steyn brought about reliance on the research as he verified my interpretations and findings with various CoPs whilst also ensuring that all feedback received remained confidential when my findings were communicated to the leadership to protect the identities of all CoPs and respondents.

Charmaz (2006) states that originality in research should present a unique value proposition which will be significant theoretically and socially. The unique value proposition should thus be able to be challenged and extended, or should improve current ideas, concepts and practices in society. REBIRTH as my unique value proposition and solution within the field of OCD illustrates that the basis of this research although premised on other integral research scholars, offers a fresh contribution and a new approach towards achieving inclusive transformation catalysing social innovation. My REBIRTH framework may be adapted and is thus the key as a new OCD frame.

Relevance refers to whether participant's authentic issues have been addressed in research, and whether the research provides solution to resolve these issues (Charmaz, 2006) and Glaser (1978). As presented in Chapter 4, the story of FNB Private Wealth Client-Servicing, I identified the challenges faced by this BU and it is from thereon that rebirth as transformation journey was proposed to address

and solve these challenges through transforming in an inclusive manner thus being relevant. Below I will present the ethical considerations of the study.

#### **10.10.6 Ethical Considerations**

To ensure that ethical considerations were fulfilled in my research, Shannon remained as an active observer, enquirer and sounding board to validate the authenticity of the interpretation of the data, and to manage key logistical requirements in the process, supporting and enabling stakeholder management and buy-in. Due to her leadership experience with FNB Private Wealth Client-Servicing her expertise brought broader context into view and more particularly the element of trust between participants and me.

The participants' authentic issues as relevant to the study were the key to validate the relevance of my findings (Charmaz, 2006 and Glaser, 1978). Regular engagements with participants allowed them to validate the research, accepting that their issues were truthfully presented. This research followed a process wherein all processes within rebirth had informed consent from individuals, CoPs, leadership, sponsors and the case organisation to participate in this journey without invading privacy which further ensured that no harm was caused to participants (Diener and Crandall, 1978). There was no ethical transgression and where a threat of this appeared, the sponsor and I pro-actively managed the situation as I based my community engagements on Hope and Timmel (1996) TFT approach wherein surveys and interviews conducted remained confidential to engage deeply the FNB Private Wealth Client-Servicing community in identifying and defining the community problem.

#### **10.11 Conclusion**

Geoffrey Chaucer in the mid-1380s coined the idiom, "all good things must come to an end" and we are now at the end of this thesis. In this thesis, I demonstrated that when people and communities within organisations are engaged authentically, using relevant processes to transform their ways of work, performance, social innovation and care within ecosystems exponentially grow. As motivated by Lessem and Schieffer's IRA, my desire is that through this study, I may be able to demonstrate the value of connecting work to life purpose towards unlocking value in applying indigenous knowledge practices towards sustainability in the field of OCD. Transforming environments in a holistic manner requires organisations to engage employees as core value towards breaking new ground as presented in this thesis and building aligned understanding with regards to issues of identity becomes the key.

This thesis's unique layout followed Lessem and Schieffer's (2010) 4C (Call, Context, Co-creation and Contribution) IRA. The thesis began with my personal journey as presented in Chapter 2, where I told my story and grounded to Call being the first C of the 4C IRA according to Lessem and Schieffer (2010). This began my 4C integral journey as captured through my lived experiences. I then presented the story of my culture in Chapter 3 which also grounded my Call in community in the South.

In Chapter 4, I presented the story of FNB Private Wealth Client-Servicing which is presented as the second C, Context of the 4C IRA (Lessem & Schieffer, 2010). Within the case organisation, FNB Private Wealth Client-Servicing context, this BU was faced with challenges for which I was called to address and solve. This research took this BU a long way forward from where its journey started. The rebirth transformation journey put in place strong foundations and slowly started to transform the culture of the case organisation. So much so that it has reached a tipping point where the rebirth vision of community excellence and purpose have started to erode out the old culture of "mediocrity".

However, as with any situation that has reached a tipping point. It is just as easy to tip backwards as it is to tip forward.

In Chapters 5 and 6, I presented the third C of the 4C IRA as Co-Creation wherein I presented the story of CoPs and research methodology and design respectively. In Chapter 7, I presented the fourth and final C being Contribution which is presented in four parts being Chapter 7, Chapter 8, Chapter 9 and Chapter 10. Rebirth as organisational transformation journey can be experienced as built on sound traditional values, driving people with authenticity, honesty and trust. These are key factors that together serve to transform a group of people into a winning, championship team that can and will deliver on their objectives. This does not mean that the objective becomes easy, and rebirth by no means made the journey easy, rather rebirth is hard and difficult, but it is also very effective and rewarding and ultimately put FNB Private Wealth Client-Servicing in a state that moved it to achieving its objectives and becoming a great business that is now praised and admired by both internal and external stakeholders. And so, the shift could happen to trust and believe in the system, the cause and the vision and to give back to the business by helping take the business forward and enhancing the business milestone at a time as presented in Chapter 8 of this thesis, being researcher's participative observations and the CoP's collective voices.

In Chapter 9 I presented my research results findings and recommendations within the case organisation. Viljoen (2015:28), states that organisational transformation implies in-depth change in the way individuals, groups and organisations behave. Further to this, Viljoen (2015:29) cites Zohar and Marshall (2000) stating that, "the emotional and spiritual resources of an organisation may be accessed using bonding symbols, myths, ceremonies and rituals." Mbigi (2000:96) states that organisational transformation is not simply an intellectual journey, but is also an emotional and spiritual journey. Organisational transformation is therefore a collective effort which requires the organisation and its employees to connect spiritually to thrive and realise common vision. Therefore, this rang true to the FNB Private Wealth Client-Servicing case in that through Southern norms a financial organisation such as this may transform inclusively and catalyse social innovation.

I wish, through this thesis, to share value latent in engaging the Southern voice as relevant science and frame toward inclusive transformation. The voice of the South introduces knowledge ecology which includes individual and environmental ecology, within human and social ecology. The human species is part of nature and the visual symbol of the Southern realm is the web of life. The human organ is the heart which corresponds with all inner capacities like emotional intelligence. In this thesis echoing from the Southern realm music resembles the strong earthy rhythms of African drums symbolising the entire human body, dancing in and with creation, inspired by the rhythm of life.

The core values of the Southern voice are healthy participation and coexistence within the womb of the Tribe. This symbolises the web of life within the collective circle of the Elders. The womb represents life and the interdependency of all life framed in one web within the tribal circle which alludes to the original oneness of all life, underlying all of creation. Human organisms link to the attributes of integral thinking, the heart to the emotions, intelligence to the inter-personal and intra-personal intelligences. The sound of music symbolises the heartbeat within the strong earthy rhythms which are African and introduces the Rebirth journey towards a pathway for inclusive transformation, catalysing social innovation.

The Southern voice deals with engaging all parties in the community and interested stakeholders in a process of radical enquiry, immersing oneself in a life world of immediately lived experiences, concentrating on illuminating the nature of the inner self and the other parties involved in one's challenge. Focus must be on the subjective view of experience and locating unique and cultural history as an episode in the larger story. This is important to enable the researcher to go beyond reductive positivism and naive empiricism.

I uniquely attempted to position REBIRTH as transformational journey to highlight the contribution it offered as relevant in today's complex organisational dynamic. As organisational transformation journey, I aimed at sharing with the world a Southern perspective for transforming organisational ecosystems ecologically as I believed this would contribute significantly towards driving transformational evolution and inclusive social innovation. The rebirth journey presents an opportunity for individuals, communities, society and the larger world to produce the courage to see freshly, and to have the capacity to suspend established ways of seeing. This is essential for important scientific discoveries within the world's unique challenges.

Africa is a place of wisdom and this could be a meaningful place to re-enter the Womb of the Tribe and thereby challenge organisations to suspend established views collectively. Africa is a place of many peoples, many tribes and many beliefs. It is a place of terrible tragedies, immense compassion and great wisdom. However, there is a vision of Africa, based on the nobility of the tribe within a collective voice which appreciates the power of the past, the importance of the present and the joy of becoming part of the future vision. A land of strong cultures that survives and develops collectively, remembering its Ancient Seed, its inherent wisdom and ever-increasing readiness to transform and secure in knowledge.

The rebirth journey offers organisations an integral vision of harmony, prosperity and empowered work teams, of true democracy, of cooperation and interdependence of voice and challenge. It promotes trust and pride regarding our African-ness in our global village and is relevant in our time of global shift. Africa has its own customs, languages, culture, philosophies and beliefs for the achievement of future vision that must precede, and guide us to the ultimate expression of our innate values. This creates a collective culture of productivity, efficiency and effectiveness, of conscious promotion of the Rebirth values and philosophy. Schafer (1996) states, "culture with its holistic perspective is the key to the future."

The traditional African approach to rebirth promotes collective healing within a more holistic approach and the role of the community becomes apparent in the womb of the Tribe as point of entry. The collective voice of rebirth comes to us through our traditional African roots of *Botho-Ubuntu* which translate to morality, humaneness, compassion, care, understanding and empathy (Mbigi, 2005). It is one of sharing and hospitality, of honesty and humility. It is the ethical philosophy and interaction that occurs within the extended African family. *Botho-Ubuntu* promotes interaction among diverse peoples, and manifests through the actions of people, through truly meaningful conversations we have with one another and for humanity. It can be defined through interaction with others (Mbiti, 1969: 202).

As a parting short, I remain cognisant that to a large extent our culture's view of time determines our priorities and orientation in life. Cultures differ in how they view time. That for the Western man time is a commodity outside man through which he moves. Foremost is the awareness that time is limited and therefore must be used economically. For the African, time is connected to specific situations. Time is primarily viewed in relation to community and should therefore be flexible to accommodate what is important for relationships. Furthermore, where the Westerner has a linear concept of time, the African has a cyclical understanding of it. This understanding of time is closely linked to the all-important emphasis Western culture puts on progress. Progress implies that the past is left behind and better things can be expected of the future. It implies a strong and optimistic orientation towards the future.

The African is conscious of the right time for something which would involve considering when something is appropriate for the people involved. For the Westerner, the right time is simply the time that is decided on or planned. The traditional African's time concept is organically founded and socially directed. The Westerners concept of time is based on the mechanical (mathematical-physical) and economically qualified or directed. Qualitative time is more than what can be expressed in numbers, measured according to concrete events. Because of its abundance the time needed can be made. Time should be enjoyed together and as an individual, a tranquil pace and relaxed human relationships as time is our servant and we evolve together as a community with time.

I am propelled to reflect on the richness of an African proverb which says: "He, who does not know one thing, knows another," and I know that I am privileged to be an emerging academic journey traveller. I hope I will do justice through this work to add a richer and deeper layer to the broader transformational circumference already in existence. Through this study, I wish to acknowledge and celebrate mother Africa and her rich innate wisdom and diversity.

My view is that regardless of all that is, it is now time for Africa. It is now time for the Southern Voice to emerge and REBIRTH future ecology. In the words of Isaiah Chapter 6, verse 8 where God asks, "Now whom shall I send? Who shall go for us?" I then said: "Here I am, send me." I am Mamohau, I am raising the Southern voice and this is my story.

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## Written Consent and permissions:

You forwarded this message on 17/09/2015 09:06 PM.

From: Uli von Kapff [uli@iafrica.com] Sent: Thu 17/09/2015 09:03 PM  
To: Ramagaga, Lebogang  
Cc:  
Subject: RE: Zulu-Culture.co.za

Good evening Lebogang,

Thank you for your email.

You are welcome to make use of my material for your colleague's PhD thesis.

Kind regards,  
Uli

Uli von Kapff  
1 Peerboom Ave  
Thornton  
Cape Town  
7460


Tel. 021 535 2049

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**From:** Ramagaga, Lebogang [<mailto:LRamagaga@fmb.co.za>]  
**Sent:** 17 September 2015 20:37  
**To:** [uli@iafrica.com](mailto:uli@iafrica.com)  
**Subject:** Zulu-Culture.co.za

Good evening Uli,

I trust this email finds you well.



**Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012)**

Category	Item	Strengths or Opportunities (items only)	Favourable	Neutral	Unfavourable
Strategic Leadership & Direction			83%	12%	6%
Strategic Leadership & Direction	1. My business is making the changes necessary to compete effectively.	Opportunity	82%	12%	6%
Strategic Leadership & Direction	18. People at all levels are held accountable for ethical behaviour.		82%	12%	6%
Strategic Leadership & Direction	19. I understand how my business plans to be successful in the future.		85%	12%	3%
Strategic Leadership & Direction	22. I am confident that business’ leadership will keep my business competing successfully.	Strength	90%	5%	4%
Strategic Leadership & Direction	32. I have confidence in my business’ business strategy.		86%	13%	1%
Strategic Leadership & Direction	49. Communication in my business is open and honest.		71%	16%	13%
Alignment			88%	9%	3%
Alignment	2. My business’ leadership provides a clear sense of direction.		85%	9%	6%
Alignment	38. My work group’s activities are clearly aligned with my business goals.		85%	13%	2%
Alignment	44. I understand how I contribute to my business’ goals and objectives.		88%	10%	2%
Alignment	47. I understand my business’ goals and objectives.	Strength	93%	6%	1%
Immediate Manager			84%	11%	5%
Immediate Manager	3. My immediate manager treats me with respect.		85%	13%	2%
Immediate Manager	34. My immediate manager communicates effectively.		82%	12%	6%
Immediate Manager	36. My immediate manager inspires high performance through their leadership.	Strength	84%	10%	6%

**Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)**

Category	Item	Strengths or Opportunities (items only)	Favourable	Neutral	Unfavourable
Customer/Client Focus			71%	17%	12%
Customer/Client Focus	4. My business is organised in a way that effectively serves our customers.		76%	14%	11%
Customer/Client Focus	17. At my business, we consider what is important to our customers when making decisions		74%	15%	11%
Customer/Client Focus	20. Processes and procedures allow me to effectively meet customers’ needs.	Opportunity	48%	29%	23%
Customer/Client Focus	23. At my business, we collaborate to meet my customers’ needs more effectively.		77%	14%	10%
Customer/Client Focus	40. New products and/or services introduced here closely match what our customers want.	Opportunity	74%	18%	7%
Customer/Client Focus	56. I am empowered to take action to meet customers’ needs.		74%	14%	12%
Engagement			78%	16%	6%
Engagement	5. I am very confident in the future success of my business.		87%	10%	3%
Engagement	6. I see myself working for my business 12 months from now.		66%	22%	12%
Engagement	10. I am excited about the way in which my work contributes to my business’ success.		84%	11%	5%
Engagement	15. I am proud to work for my business.		87%	13%	0%
Engagement	46. I feel energised by my job/role.		63%	23%	14%
Engagement	51. I would recommend my business as a great place to work.		80%	18%	2%
Execution			69%	17%	13%
Execution	7. I am empowered to make decisions that improve the quality of my work.		69%	17%	14%
Execution	13. The people I work with cooperate to get the job done.		87%	7%	5%
Execution	26. My job makes good use of my skills and abilities.		68%	16%	16%

**Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)**

Category	Item	Strengths or Opportunities (items only)	Favourable	Neutral	Unfavourable
Execution	37. I have the tools and resources to do my job well.		72%	19%	9%
Execution	39. Our work processes are well organised and efficient.	Opportunity	49%	23%	28%
Execution	41. My job responsibilities are clear to me.		82%	11%	7%
Execution	55. People here fix problems so that they don’t happen again.		57%	28%	15%
Agility			76%	18%	7%
Agility	8. The people that I work with in my business adapt easily to new ways of doing things.		70%	23%	6%
Agility	11. The people that I work with in my business take on new responsibilities as the need arises.		78%	18%	4%
Agility	14. My business adapts well to changes that affect the way in which we operate.		80%	13%	7%
Agility	30. In my work group, we dedicate adequate time to planning for future changes.		63%	26%	12%
Agility	43. At my business we anticipate changes taking place in the business environment.		87%	9%	4%
Diversity			74%	16%	10%
Diversity	9. My immediate manager encourages an environment where individual differences are valued.		80%	12%	9%
Diversity	12. People of all backgrounds can succeed at my business.		70%	19%	11%
Diversity	48. Employees at all levels in my business are treated with respect.		71%	17%	12%
Growth & Development			73%	18%	9%
Growth & Development	16. I have received enough training to do a quality job.		78%	14%	9%
Growth & Development	35. I am given a real opportunity to improve my skills in my business.		76%	17%	7%
Growth & Development	45. My career goals can be met at my business.		71%	22%	6%

**Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)**

Category	Item	Strengths or Opportunities (items only)	Favourable	Neutral	Unfavourable
Growth & Development	50. My immediate manager takes an active interest in my growth and development.		69%	19%	12%
Innovation			71%	20%	9%
Innovation	21. I feel encouraged to come up with new and better ways of doing things.		71%	20%	9%
Innovation	27. At my business we regularly try new ideas in order to improve our products or processes.		78%	13%	10%
Innovation	29. I feel comfortable speaking up in my business.		69%	18%	13%
Innovation	31. Good ideas are adopted here regardless of who suggests them or where they come from.		72%	26%	2%
Innovation	53. I see cooperation across different departments and groups.		65%	24%	11%
Innovation	54. My business accepts mistakes in the process of doing new things.	Strength	72%	16%	12%
Performance, Recognition & Reward			61%	21%	18%
Performance, Recognition & Reward	24. My good work is acknowledged by people who are important to me.		80%	15%	5%
Performance, Recognition & Reward	25. I am paid a fair wage for the work that I do.	Opportunity	34%	26%	40%
Performance, Recognition & Reward	28. The overall evaluation of my performance is fair.	Strength	59%	20%	21%
Performance, Recognition & Reward	33. People in my business advance primarily because of their performance.		53%	28%	19%

**Appendix A: FNB Private Wealth Client-Servicing People’s Pillar Survey Questionnaire (2012) – (continued)**

Category	Item	Strengths or Opportunities (items only)	Favourable	Neutral	Unfavourable
Performance, Recognition & Reward	52. I receive on-going feedback that helps me improve my performance.		80%	15%	5%
Survey Follow Up			64%	24%	12%
Survey Follow Up	42. As a result of the survey, I think leadership will take the necessary action.		64%	24%	12%
Collaboration			76%	15%	9%
Collaboration	1. My immediate manager encourages an environment where individual differences are valued.		80%	12%	9%
Collaboration	13. The people I work with cooperate to get the job done.		87%	7%	5%
Collaboration	23. At my business, we collaborate to meet customers’ needs more effectively		77%	14%	10%
Collaboration	29. I feel comfortable speaking up in my business.		69%	18%	13%
Collaboration	53. I see cooperation across different departments and groups.		65%	24%	11%
	If you could recommend one change that would improve <del>make your my</del> business <del>better</del> , what would that be, and how should it be done?		54%	5%	41%

**Appendix B: Solicited data (In-Depth interviews)**

Phase	Data gathered	Activities	Method – Focus group themes taken	Sample size	Objectives
1	Grand Narrative: Qualitative	Focus groups and in-depth interview schedules	<ul style="list-style-type: none"> <li>Rebirth conversations</li> </ul>	<ul style="list-style-type: none"> <li>(Participants FNB Premium Client Servicing): n = 120</li> <li>4 focus groups: n = 32</li> </ul>	To explore the <b>Rebirth</b> climate and culture, collaboration and learning, innovation and sustainability within the learning experience and new themes for <b>Rebirth</b> and integral development.
2	Grand Narrative: Qualitative	Focus groups and in-depth interview schedules	<ul style="list-style-type: none"> <li>Rebirth conversations</li> </ul>	<ul style="list-style-type: none"> <li>(Participants FNB Premium Client Servicing): n = 120</li> <li>1 focus groups and individual interviews: n = 32</li> <li>4 face-to-face in-depth interviews: n = 4</li> </ul>	To explore <b>Rebirth</b> nuances and subtleties through informal engagement with leaders within organisational leadership and management praxis.
3	Grand Narrative: Qualitative	Focus groups and in-depth interview schedules	<ul style="list-style-type: none"> <li>Rebirth conversations</li> </ul>	<ul style="list-style-type: none"> <li>1 focus group purposefully selected: n = 8</li> <li>Individual interviews: n = 4</li> </ul> (Directors FNB Premium Client Servicing)	To explore <b>Rebirth</b> within FNB Premium Client- Servicing collective and individual attitudes towards creative leadership, innovation, collaboration of learning, culture and sustainability realities within organisational structures and exploring new lenses for future innovation.

**Appendix B: Solicited data (In-Depth interviews) – (continued)**

Phase	Data gathered	Activities	Method – Focus group themes taken	Sample size	Objectives
4	Grand Narrative: Qualitative	Focus groups and in-depth interview schedules	<ul style="list-style-type: none"> <li>• Rebirth conversations</li> <li>Laminations</li> </ul>	<ul style="list-style-type: none"> <li>• 1 focus groups purposefully selected leaders FNB Premium Client-Servicing: n = 8</li> <li>• 4 face-to-face in-depth interviews: n = 4</li> </ul>	To explore and solicit diverse opinions from participants and educational specialists and industry leaders regarding the new <i>Rebirth</i> journey within FNB Premium Client-Servicing
5	Grand Narrative: Qualitative	Focus groups and in-depth interview schedules	<ul style="list-style-type: none"> <li>• Rebirth conversations</li> <li>Laminations</li> </ul>	<ul style="list-style-type: none"> <li>• 1 focus groups purposefully selected leaders FNB Premium Client Servicing: n = 8</li> <li>• 4 face-to-face in-depth interviews: n = 4</li> </ul>	To explore <i>Rebirth</i> within FNB Premium Client- Servicing and collective towards creative leadership, integral innovation, collaboration of learning, culture and sustainability.

**Appendix C: Rebirth transformation journey focus group planning schedule– Phase 1 and 2  
August – December 2014**

<b>August 2014</b>	<b>Planning detail – Rebirth and Innovation</b>
21.08.14	<b>CoPs’ meeting for initial briefing on programme - 21.08.14</b> CoP 4 07:00 – 10:00 CoM 10:30 – 13:30 CoP 5 – 14:00 – 17:00
22.08.14	<b>CoPs’ meeting for initial briefing on programme - 22.08.14</b> CoM 12:30 – 13:30 Planning meeting - 11:00 – 13:00
25.08.14	Update meeting with CoM E-mail preparation to all CoPs
26.08.14	<b>CoP 1-3 Tuesday - 26.08.14</b> CoP 1 – 07:00 – 09:00 – Feedback sessions on Rebirth introduction CoP 2 – 09:30 – 11:30 – Feedback sessions on Rebirth introduction CoP 3 – 12:00 – 14:00 – Feedback sessions on Rebirth introduction E-mail preparation to all CoPs
27.08.14	<b>CoP 4, 5 and Mix - Wednesday 27.08.15</b> CoP 4 – 09:00 - 10:00 – Feedback sessions on Rebirth introduction CoP 5 – 10:30 - 11:30 – Feedback sessions on Rebirth introduction CoM – 12:00 - 13:00 – Feedback sessions on Rebirth introduction E-mail preparation to all CoPs
28.08.14	<b>CoP 4, and 5 - Thursday 28.08.15 - Templates</b> CoP 4 – 09:00 - 10:00 - Feedback on research CoP 5 – 10:30 - 11:30 – Feedback on research 11:30 – 12:00 - discuss the ideation and creativity sessions that need to be set up. (Gethan, Lynton and Thishan as CoP members)
29.08.14	<b>CoP 4, &amp; 5 &amp; CoM- Friday 29.08.15 – To be rescheduled – Gethan has advised that month-end volumes will not be allowed</b> CoP 4 – 09:00 - 10:00 - Feedback to researcher and rebirth sponsor CoP 5 – 10:30 - 11:30 – Feedback to researcher and rebirth sponsor CoP Mix 12:00 - 13:00 - Meeting regarding progress on rebirth journey

**Appendix C – (continued)**  
**August 2014**

<b>Integral innovation steps</b>	<b>Date and demarcated person</b>
Strategic planning meeting to be held to determine fusion innovation pathway - develop and install as a physical manifestation and reference to the entire process within the Suite. Cop 1-3 marked on templates with final 5 scenarios - rest of ideas on parking lights. We also need to ensure that CoP 4 -5 and mix are brought into the larger fusion process.	18.08.14
Rebirth – final planning for CoP 6 – Rebirth journey – followed by final preparation and planning for innovation sessions for CoP 6	24.09.14
Complete CoP 1-3 for final presentation of template and green light with timeline (project plan)	25.09.14
Finalise for CoP 4 & 5 research and templates and integral innovation steps	25.09.14
Rebirth process starts and CoP1-3 are introduced to the Archetypes and the womb of the Tribe.	26.09.14
Important benefits for the rebirth process – Risk and responsiveness	On-going
Accepting responsibility and accountability for each CoP – regroup and feedback on reports CoP 1-3	September 2014
Core values of trust – Rebirth process – CoP 1-6	On-going
Commitment and respect to become more responsive – CoP 1-5 and 6	On-going
Innovation for idea generation finalised with CoP 1-5 and introduced to CoP for Risk aversion	August – September 2014
Funnelling the innovation process – regroup CoP 1-5 introduce to CoP 6	Planning in August 2014
Representation of FNB critical issues – This regroups CoP 1-6	August planning
Final funnelling process and presentations done – CoP decides on CoM	September 2014
Final Presentations to Management group and Malcolm – CoP 4 and 5 – and final sign-off for CoP 1-3	September 2014
CoP1-3 presents templates and research to obtain final go ahead for first tier (CoP 1-3)	End August 2014
Interventions to establish CoPs independently – specific tasks for CoP 1-5 with sign-off	September 2014
Templates for Spinn innovation are introduced to CoP 4 and 5 and they complete research and training	September, October and November 2014
Process regarding ownership responsibility and accountability in the Rebirth journey –to be completed and finalised with CoP 4 and 5	September, October and November 2014

**Appendix C – (continued)**

**Phase 2: Spinn, Research, Fusion and Green Light sign-off**

<b>September 2014</b>	<b>Planning detail – Rebirth</b>
01.09.14	Transformation journey - Spinn and risk on all innovations for CoP 1-3 & CoM
02.09.14	<b>CoP 1-3 &amp; Mix - 02.09.14 Spinn innovation and risk:</b> Every CoP has 15 minutes to present all 5 critical scenarios Mix - 07:00 - 09:00 - Presentation on critical scenarios CoP 1 – 09:30– 11:30 - Presentation on critical scenarios CoP 2 – 12:00 – 14:30 - Presentation on critical scenarios CoP 3 – 15:00 – 17:00 - Presentation on critical scenarios
03.09.14	Researcher and CoM and CoP check-in
05.09.14	<b>Friday 05.09.14 10:00 – 12:00</b> Short debrief on Client-Servicing Quarterly Recognition Awards Ball, innovation movie - discuss plan for Ball 14:00 – 15:00 – Meeting with researcher and sponsor
08.09.14 – Monday	Meta and qualitative data collection Rebirth and innovation Climate survey Research to be completed per all 5 innovations – clear research with data and recommendations:
11.09.14	Meta and qualitative data collection and edit
15.09.14	CoP 1-5 & CoM Final presentations 07:00 – 08:00 CoM (semi-final) 08:00 – 09:00 CoP 5 (semi-final) 09:30 – 10:30 CoP 4 (semi-final) 11:00 – 12:00 CoP 3 Final – risk, research and recommendations 12:30 – 13:30 CoP 2 Final - risk, research and recommendations 13:30 – 14:30 CoP 1 Final - risk, research and recommendations
16.09.14	Feedback on climate survey and analysing data Core researcher and PAR team debrief on rebirth transformation journey milestones: Risks, triumphs, resources, that leadership need to be aware of, planning and recalibration, debriefing 11:00 – 13:00 Also discuss tribal celebrations and artwork for CoP 1-3 AND CoM to be done in the garden. Arrange canvasses, poster paints, stands and get sponsor sign-off.
18.09.14	<b>18.09.14</b> CoP 4 09:00 – 11:00 & 5 11:30 – 13:30 - for two hours each to finalise templates to get them ready.
22.09.14	Meeting – Darren, Mamohau – 11:00 – 12:00
23.09.14	Meeting – Mamohau, COE and Malcolm - 13:00 – 14:30

**Appendix C – (continued)**  
**September 2014**

<b>Integral innovation steps</b>	<b>Date and demarcated person</b>
CoP 1-6 in for formal rebirth journey and final planning meeting	24 – 26.09.14
CoP 6 – profiles for Innovation roles	15.09.14
CoP 6 – profiles for knowledge roles	15.09.14
Colin to finalise CoP 6 profiles	15.09.14
CoP 4 and 5 finalisation and presentation	20.09.14
Final CoP 4 and 5 templates and sign-off	28.09.14
Rebirth process starts and CoP1-3 are introduced to the Archetypes and the womb of the Tribe.	September 2014
Introducing the Archetypes for innovation – CoP 6	September 2014
Leadership for collaboration for CoP 6 – and final 4 and 5	October 2014
Important benefits for the rebirth process for CoP 6	On-going
FNB Premium Client Servicing as one voice including new CoP 1-5 and CoM	September/October 2014
Accepting responsibility and accountability for CoM and CoE	September/October 2014
Core values of trust for CoE (and commitment to process)	On-going
Representation of FNB critical issues with the new CoP 6 and new responsibility	On-going
Facilitation of full scope of 250 innovation ideas – on strategic plan	End October 2014
Navigation templates and full strategic plan for all 25 scenarios to be finalised and presented	End October 2014
Final funnelling process and presentations of 25 scenarios of CoP 1 – 6	29.09.14
Final Presentations to leadership group and sponsor	
Templates for Spinn innovation are finalised for CoP 6 and finals	End October
On-going process regarding ownership responsibility and accountability in the Rebirth journey	On-going

**Appendix C – (continued)****October 2014**

<b>October 2014</b>	<b>Planning detail – Rebirth</b>
03. 10.14	Meeting with sponsor Re-group meeting for planning for the rest of the year
06. 10.14	Debrief – current and future states
08. 10.14	Data and survey presentation CoM – 08:30 – 09:30 CoP 1 – 10:00 – 11:00 CoP 2 – 11:30 – 12:30 CoP 4 – 12:30 – 13:30
13. 10.14	Names, training times, workshop outcomes
14. 10.14	Debriefing - Implementation of Innovations
27. 10.14	Workshop data collection to add to survey
28. 10.14	Focus group – Delphi technique Tier 1
29. 10.14	Workshop data collection add to survey
31.10.14	Workshop data collection add to survey

**Appendix C – (continued)**  
**October 2014**

<b>Integral innovation steps</b>	<b>Date and demarcated person</b>
Introducing innovation toolkit 3 – CoP 1 – 6/CoE and CoM	End October 2014
Future fusion seminar CoE	End October 2014
Finalise CoP 1-5 and 6 and – ROI and evaluation	End October 2014
CoE/CoM and CoP 1-5 – Mentoring and evaluation	November 2014
Plan for CoP 7-10	November 2014
Rebirth process starts and CoP 7-10 are introduced to the Archetypes and the womb of the Tribe.	On-going
Introducing the Archetypes for innovation – CoP 7-10	November - December 2014
Leadership for collaboration for CoP 7-10	November 2014
Important benefits for the rebirth process – CoP 7-10	November 2014
FNB Premium Client Servicing as one voice – CoP 1-6 AND CoE and CoM - Mentorship	On-going
Accepting responsibility and accountability for each CoP – CoE and CoM - Presentation	On-going
Core values of trust – Quo Various CoP 1-6	November 2014
Commitment and respect – Rebirth: continuous training	November 2014
Innovation for idea generation with CoP 1-6 – CoE and CoM – Half day training	November 2014
The funnelling process – as final scenarios 25 +5 = 30 (including CoP 6)	On-going
Representation of FNB critical issues – For achieving 2025 – Evaluation report	On-going
Facilitation 2025 – report and presentation by all CoP – CoE and CoM	On-going
Navigation templates 2025 Evaluation and implementation	November 2014
Final funnelling of 2025 – 30 scenarios	November 2014
Final Presentations to Management – CoP 6 – and introduce to research	November 2014
CoP 6 training for research	November 2014
CoP 6 presents templates and research	November 2014
Interventions to establish CoPs independently for 2015	December 2014
Templates for Spinn innovation are finalised for six-month evaluation	December 2014
Ownership responsibility and accountability in the Rebirth journey	December 2014

**Appendix C – (continued)**

**November 2014**

<b>November 2014</b>	<b>Planning detail – Rebirth and Innovation</b>
05. 11.14	Lamination process
07. 11.14	CoP tribal celebration, presentation and implementation follow-up Tribal celebrations and artwork for CoP 3 & CoM

**November 2014**

<b>Integral innovation steps</b>	<b>Date and demarcated person</b>
Evaluation and reporting	December 2014
New programme to ensure CoP 7-10 introduced	January 2015
Evaluation and percentage rate of innovation implementation	January 2015
Added value report	December 2014 – January 2015
Rebirth process starts and CoP 7-10 are introduced to the Archetypes and the womb of the Tribe.	Training January-February 2015
Introducing the Archetypes for innovation to CoP 7-10	January 2015
Leadership for collaboration with CoP 1 -10	January 2015
Important benefits for the rebirth process – Evaluation and report	January 2015
Premium Client Servicing as one voice – Evaluation and reporting	January 2015
Accepting responsibility and accountability for CoE/CoM/CoP 1-6 – Evaluation and report	January 2015
Core values of trust of Rebirth – report	January 2015
Innovation for idea generation – prepare schedule for CoP 7-10	January 2015

**Appendix C – (continued)****December 2014**

<b>December 2014</b>	<b>Planning detail – Rebirth and Innovation</b>
08. 12.14	Planning for 2015
11. 12.14	Rebirth celebration workshop

**December 2014**

<b>Integral innovation steps</b>	<b>Date and demarcated person</b>
Evaluation of implementation and improvement	December 2014
Evaluation report and feedback – CoM	January 2015
Evaluation and report and feedback CoP 1-6	January 2015
Rebirth process– planned for 2015.	January 2015
Introducing the Archetypes for innovation to CoP 7-10 for 2015	January 2015
Final funnelling process and presentations of 2014	December 2014
Final Presentations to FNB – Improvement value and productivity and Risk	January 2015
On-going process regarding ownership responsibility and accountability in the Rebirth journey toward achieving the 2025 vision	December 2014/January 2015/February 2015

**Appendix D: FNB Premium Client-Servicing – Rebirth and Innovation Diagnostic**

Phase 2-Of Rebirth Journey Data Gathering- Qualitative - August 2014

All members of communities of Practice 1-5 are kindly requested to complete the following questionnaire as objectively and truthfully as possible and to submit the completed document to Shannon by 15 August 2014.

Please answer the following questions by choosing the most appropriate answer and describing your honest response to the questions. The purpose of these questions is to establish the innovation culture and climate within FNB Private Wealth Client Servicing within the rebirth and integral innovation journey. The findings will be analysed on an excel chart. Your response will remain anonymous.

**SECTION A: Rebirth innovation culture**

Please answer the following questions by choosing the most appropriate answer and describing your response to the answer.

**1. REBIRTH INNOVATION CULTURE**

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
1.1 My organisation values drive rebirth innovation culture?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2 My organisation creates opportunities for rebirth innovation culture?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3 My job allows me to be innovative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.4 My immediate supervisor encourages innovation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.5 My organisation values rebirth as an innovation asset?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.6 Servicing Suite is an innovative working environment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.7 My supervisor provides me with challenging and innovative tasks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the present situation in the rebirth regarding innovation culture within servicing Suite

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**2. KNOWLEDGE SHARING AND INNOVATION**

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
2.1 My organisation values knowledge sharing and innovation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2 My organisation creates opportunities for knowledge sharing and innovation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3 My immediate supervisor encourages knowledge sharing and innovation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.4 My organisation values knowledge sharing as an innovation asset?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.5	My organisation is a knowledge sharing environment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.6	There are strict working rules on how I should perform my job?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.7	My supervisor discusses my solutions to problems with me?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the knowledge sharing culture within your organisation:

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### 3. CREATIVITY AND INNOVATION

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
3.1	My organisation values just-in-time knowledge combinations for creative problem solving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2	My organisation values creativity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3	My organisation creates opportunities for creativity to prosper?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.4	My organisation is a creative working environment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.5	My job allows me to be creative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6	My immediate supervisor encourages creative problem solving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.7	My supervisor provides me with challenging and creative tasks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.8	My organisation values creativity as an innovation/rebirth asset?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the use of innovation and creativity within the Servicing culture:

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### 4. CONTINUOUS LEARNING

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
4.1	Is there a clear process for learning and development in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2	Are your individual training needs identified and satisfied?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3	Does rebirth innovation generally contribute towards careers in the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4	Are promotions based on knowledge gained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5	Do you know how to build and organise knowledge structures with your community of practice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.6	Do you know how to evaluate your own learning competencies and those of others?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.7	Can you source the knowledge you require but might not possess?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.8	Is continuous learning encouraged, facilitated and provided by your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the continuous learning culture within your organisation:

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<b>5. COMMUNITIES OF PRACTICE</b>		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
5.1	Is team involvement and sharing valued over individuals becoming experts in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2	Are team members encouraged to support each other and share best practice for collective achievement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.3	Have there been recent activities in the organisation like competency profiling, coaching and business process reengineering?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.4	Do you feel supported by your formal workplace community?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.5	Are all working groups encouraged to share knowledge and information freely within your organization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6	Do you innovate with your community of colleagues at work?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.7	Do you have an enthusiastic willingness to work with others versus working on your own?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.8	Are there sufficient opportunities for face-to-face meetings and regularly scheduled events to meet with co-workers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.9	Are face to face meetings supplemented by electronic communications?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.10	Do your co-workers consistently provide support to you and others?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.11	Do you believe that your co-workers have a sense of allegiance and loyalty to the organisation and to each other?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the team work culture within your organisation:

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## 6. INNOVATIVE LEADERSHIP

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
6.1	Do you feel that human capital is valued by leadership in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.2	Does your human resource representative, partner with the business by being involved in the strategic decision-making process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.3	Do you feel that the human resource function improves the quality of work-life in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4	Do you feel you have any decision-making skills to take an active and effective leadership role in your team?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.5	Do you avail yourself of the opportunity to be a self-leader by taking self-initiated actions appropriate to your position and experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.6	Are you willing and prepared to take on more responsibility in your current position?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.7	How committed do you feel senior management is in making your organisation a collaborative organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.8	Does your manager encourage you to become more innovative and take a more active role in representing your ideas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.9	Are you and your working group given the opportunity to make important work decisions and initiate strategic actions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the innovation leadership culture within your organisation:

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## 7. TRUST

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
7.1	Is trust and mutual respect practised and valued in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2	Are differences of opinion shared freely without concern for victimisation in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.3	Are collaborative work tools (e-mail, intranet, etc.) used to encourage building trust relationships in your organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.4	Do you trust that members of your team, Internal/external, have the skills and abilities to overcome the challenges that the team faces to achieve its objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7.5	Do you trust the members of your team to behave in a reliable manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.6	Do you trust the members of your team to be supportive and not take advantage of your vulnerabilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.7	Does your manager trust the quality of your work by giving you increasingly challenging work assignments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.8	Do you feel that the organisation treats you fairly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.9	Do you feel that trust and respect are true core values that your organisation lives by?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the trust culture within your organisation:

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<b>8. COLLABORATION</b>		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
8.1	Are business cases proposed and agreed in a collaborative manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.2	Are projects prioritised in a manner that the organisation and its stakeholders can best benefit from?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.3	Do all members in the team feel comfortable to actively participate in the prioritisation process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.4	Do you feel you have gaps in the technical skills needed to adequately carry out your responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.5	Do you find it easy to work with your co-workers in day-to-day operations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.6	Do you find your day-to-day work exciting and challenging?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.7	Is every team member encouraged to voice their views on how the project is going so that the team is quickly alerted to any potential problems in the implementation process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.8	Do you have the communication and collaboration tools to work effectively with your team members and working groups throughout the organisation on a daily basis?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the collaboration culture within your organisation:

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## 9. SUPPORT

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
9.1	Do you feel that the organisation has a culture that supports innovation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.2	Does leadership encourage you to be innovative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.3	Is your immediate manager open and supportive of innovative ideas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.4	Do you feel safe to voice new ideas and opinions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.5	Does your organisation encourage environmentally safe innovative ideas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the support culture within your organisation:

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## 10. OPEN INNOVATION

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
10.1	My organisation values just-in-time knowledge combinations for innovation/rebirth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.2	My organisation values innovation/rebirth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.3	My organisation creates opportunities for innovative/rebirth interventions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.4	My organisation is an innovative/rebirth working space?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.5	My job allows me to be innovative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.6	My immediate supervisor encourages innovation in problem solving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.7	My supervisor provides me with innovative and challenging tasks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.8	My organisation values innovation/rebirth as an asset?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the integral innovation/rebirth culture within your organisation:

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## 11. ECOLOGICAL INNOVATION

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
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11.1	My organisation values just-in-time knowledge combinations for sustainability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.2	My organisation values sustainability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.3	My organisation creates opportunities for sustainability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.4	My immediate supervisor encourages sustainability in problem solving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.5	My organisation values sustainability as an asset?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the sustainability culture within your organisation:

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## 12. CUSTOMER ENGAGEMENT

		Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
12.1	Do you engage with customers during the innovation process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.2	Are your customers involved in the ideation phase?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.3	Does your innovation methodology allow for customers to propose innovative ideas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.4	Do you reward customers for innovative ideas that are successfully commercialised?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.5	Do you think that your customer has the technical knowledge to be involved in the innovation process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe the customer engagement culture through the rebirth journey in the Service Suite:

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Thank you for participating!

**Appendix E: Personal innovation profile for FNB Private Wealth Client Servicing – Thulisile Lushaba**

When innovating, it is important to consistently realise behaviour of ourselves in the Innovation Space. In some cases, this proves easy and sometimes very difficult when we are working in a community of practise.

For instance, some of us are early risers. It is easy for such people to present the image of good timekeepers at work. So, if you are an early riser and were asked how easy or hard it is for you to present an image at work of a good timekeeper, you put a clear cross on the scale below on or near “Very Easy”.

VERY HARD	HARD	AVERAGE	EASY	VERY EASY
				X

If you are the extreme other sort, you would find being on time every morning for a prolonged period difficult, and you may well put a cross on the scale at the “Very Hard” end.

Please indicate the degree of difficulty (or ease) that would be required for you to maintain the image, consistently for a long time that is asked of you by each item below:

**HOW EASY OR DIFFICULT DO YOU FIND IT TO INNOVATE CONSISTENTLY AS:**

No.		VERY HARD	HARD	AVERAGE	EASY	VERY EASY
1.	A person who is patient		x			
2.	A person who conforms				x	
3.	A person who, when stuck, will always think of something				x	
4.	A person who enjoys detailed work					x
5.	A person who would sooner create something new than improve it		x			
6.	A person who is prudent when dealing with authority or general rules					x

7.	A person who always acts with formal authority				x	
<b>No.</b>		<b>VERY HARD</b>	<b>HARD</b>	<b>AVERAGE</b>	<b>EASY</b>	<b>VERY EASY</b>
8.	A person who never seeks to bend (much less break) the rules			x		
9.	A person who holds back ideas until they are obviously needed		x			
10.	A person who has fresh perspectives on old problems		x			
11.	A person who likes to upset routines at a moment's notice			x		
12.	A person who prefers changes to occur gradually and slowly				x	
13.	A person who is thorough in all tasks					x

<b>No.</b>		<b>VERY HARD</b>	<b>HARD</b>	<b>AVERAGE</b>	<b>EASY</b>	<b>VERY EASY</b>
14.	A person who is a steady plodder-on				x	
15.	A person who copes with several innovative ideas and problems at the same time				x	
16.	A person who is consistent					x
17.	A person who can stand out in disagreement alone against a group of equals and seniors				x	
18.	A person who is stimulating				x	
19.	A person who readily agrees with the team at work		x			
20.	A person who has new original ideas			x		

21.	A person who masters all ideas painstakingly on your own			x		
<b>No.</b>		<b>VERY HARD</b>	<b>HARD</b>	<b>AVERAGE</b>	<b>EASY</b>	<b>VERY EASY</b>
22.	A person who generates innovative ideas			x		
23.	A person who prefers to work on only one problem at a time		x			
24.	A person who is methodical and systematic in thinking					x
25.	A person who always risks doing things differently			x		
26.	A person who works without deviation in a prescribed way	x				
27.	A person who likes to impose strict order and own control	x				
28.	A person who likes the safety of precise instructions		x			
29.	A person who fits readily into "the system"		x			
30.	A person who needs the stimulation of frequent change				x	
31.	A person who prefers colleagues who never "rock the boat"		x			
32.	A person who is predictable		x			

**Please check that you have answered all 32 questions.**

**Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing - Thulisile Lushaba**

**Scoring sheet**

No.	VERY HARD	HARD	AVERAGE	EASY	VERY EASY
1.	-	-	-	-	-
2.	5	4	3	2	1
3.	1	2	3	4	5
4.	5	4	3	2	1
5.	1	2	3	4	5
6.	5	4	3	2	1
7.	5	4	3	2	1
8.	5	4	3	2	1
9.	5	4	3	2	1
10.	1	2	3	4	5
11.	1	2	3	4	5
12.	5	4	3	2	1
13.	5	4	3	2	1
14.	5	4	3	2	1
15.	1	2	3	4	5
16.	5	4	3	2	1
17.	1	2	3	4	5
18.	1	2	3	4	5
19.	5	4	3	2	1

20.	1	2	3	4	5
21.	5	4	3	2	1
22.	1	2	3	4	5
23.	5	4	3	2	1
<b>No.</b>	<b>VERY HARD</b>	<b>HARD</b>	<b>AVERAGE</b>	<b>EASY</b>	<b>VERY EASY</b>
24.	5	4	3	2	1
25.	1	2	3	4	5
26.	5	4	3	2	1
27.	5	4	3	2	1
28.	5	4	3	2	1
29.	5	4	3	2	1
30.	1	2	3	4	5
31.	5	4	3	2	1
32.	5	4	3	2	1

**TOTAL SCORE:**

94
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<b>EXTREME IMPLEMENTOR</b>	<b>STRONG IMPLEMENTOR</b>	<b>IMPLEMENTOR AND CREATOR</b>	<b>STRONG CREATOR</b>	<b>EXTREME CREATOR</b>
0 – 66	67 – 86	87 – 106	107 – 126	127 – 165
4%	23%	46%	23%	4%

**Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing  
Thulisile Lushaba**

**CHARACTERISTICS OF IMPLEMENTORS AND CREATORS**

THE IMPLEMENTOR	THE CREATOR
<p>Characterised by precision, reliability, efficiency, prudence, discipline and conformity.</p> <p>Concerned with resolving residual problems thrown up by the current paradigm.</p> <p>Seeks solutions to problems in tried and understood ways.</p> <p>Reduces problems by improvement and greater efficiency, with maximum of continuity and stability.</p> <p>Seen as sound, conforming, safe and dependable.</p> <p>Liable to make goals of means.</p> <p>Seems impervious to boredom, seems able to maintain high accuracy in long spells of detailed work.</p> <p>Is an authority within given structure?</p> <p>Challenges rules rarely, cautiously, when assured of dedicated support.</p> <p>Tends to self-doubt. Reacts to criticism by closer outward conformity. Vulnerable to social pressure and authority; compliant.</p> <p>Is essential to the functioning of the institution all the time, but occasionally needs to be “dug out” of his/her systems.</p>	<p>Seen as undisciplined, thinking tangentially, approaching tasks from unsuspected angles.</p> <p>Could be said to search for problems and alternative avenues of solution, cutting across current paradigms.</p> <p>Queries problems’ concomitant assumptions: manipulates problems</p> <p>Is catalyst to settled groups, irreverent of their consensual views; seen as abrasive, creating dissonance.</p> <p>Seen as unsound, impractical; often shocks his/her opposite.</p> <p>In pursuit of goals, treats accepted means with little regard.</p> <p>Capable of detailed routine (system-maintenance) work for only short bursts.</p> <p>Tends to take control in unstructured situations.</p> <p>Often challenges rules, has little respect for past custom.</p> <p>Appears to have low self-doubt when generating ideas, not needing consensus to maintain certitude in face of opposition.</p> <p>In the institution is ideal in unscheduled crises, or better still to help to avoid them, if he/she can be controlled.</p>

**Appendix E – (continued) Personal innovation profile for FNB Private Wealth Client-Servicing -  
Thulisile Lushaba**

**WHEN COLLABORATING WITH IMPLEMENTORS AND CREATORS**

<b>THE IMPLEMENTOR</b>	<b>THE CREATOR</b>
<p>Supplies the task orientations, the break with the past and accepted theory.</p> <p>Appears insensitive to people, often threatens group cohesion and co-operation.</p> <p>Provides the dynamics to bring about periodic radical change, without institutions tend to ossify.</p>	<p>Supplies stability, order and continuity to the partnership.</p> <p>Is sensitive to people, maintains group cohesion and co-operation.</p> <p>Provides a safe base for the innovator’s riskier operations.</p>

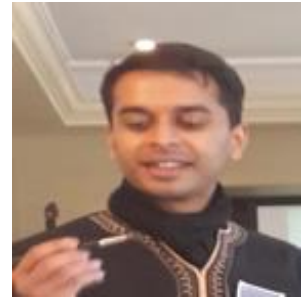
## Appendix F: Archetypes in the FNB cross generation Case Study in the womb of rebirth



**Shannon** is about dedication, strength and driven to succeed in her working life and has a personal edge to change and develop herself.

With a winning attitude, Shannon is the **Athlete** Archetype; who is a brilliant team player and possesses the ability to see beyond barriers. The athlete archetype keeps her rooted towards her core calling in the rebirth journey, allowing her full potential to transcend in the womb of rebirth.

This young elder in rebirth, has taken the initiative in the womb whenever an opportunity presented itself. Neil took charge in all aspects and is the innovation champion as well as a Junior Board member in the organisation since having entered rebirth.



**Neil** brings his **Artist** Archetype to the forefront. With attributes such as expressing dimension of life that is just beyond the five senses and inspiring others to see life symbolically, Neil is that artist that uses his talent for greater good.



The **Warrior** has the courage to create and is always alert of her surroundings and opportunities. **Lauren** leads by example in all aspects, giving her the opportunity to validate herself internally to achieve even more.

As the **Visionary**, **Malcolm** possesses self- leadership and thought leadership through his analytical mind-set, and yet he brings his ever-so-innovative and creative energies to rebirth.



The Visionary in him, allows him to see new visions and exalt vibrant energies whenever in his presence, believing that the future is there to be disseminated.

At the same time, Malcolm can be a Rebel (with a cause) presenting himself as an outsider, resulting in him not dedicated to the strategic intent, and, sometimes does not commit fully to collective goals.

**Appendix F – (continued) Archetypes in the FNB cross generation Case Study in the womb of rebirth – (continued)**



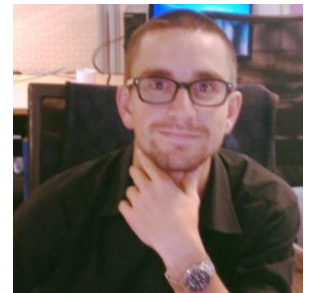
This **networker** and **magician** who does wonders and creates the deal, gets the deal because he IS the deal and drives transformation. Another young elder in rebirth, **Lynton** delivers effective communication flows by creating access to information and steering the channels, involves others and defuses information.

As the magician, Lynton is a thinker, a weaver, a creator of sacred space, a visionary and an intuitive. The magician is a powerful and dynamic archetype with many variants.

**Rudi** is one that is obsessed with bringing forth his own ideas about what should be, and manifesting them in rebirth and the world. The Creator always leaves a mark.

The **Creator** is highly imaginative and often seems to live in his own world. When in a zone, the Creator often can't manage to tear himself away from the act of creation.

Creators are bent on adding to what exists.



The builder, an inventor, a seeker, a dreamer, and a thinker; **Lebogang** is the **Artist-scientist** in rebirth.

Although distracted by her own thoughts, she frequently must be pulled out of the rain, and is simultaneously vastly knowledgeable and yet innocent, impulsive and cautious.

Artist-scientists represent the wonder to be found in curiosity, and the dangers. She can focus on a single item or idea, despite the surrounding activity, often at inopportune times for a hero she accompanies.

A leader in the organisation and an elder in rebirth, **Gethan** engineered the journey in rebirth through his creative expression flows into functionality with practical intelligence and decision-making. Gethan is the ingenious problem solver.

As the **Engineer** archetype suggests; that the engineer is wonderful at looking at everyday challenges and discovering pragmatic solutions. Gethan is an engineer who is connected to his core calling.



## Appendix G: rebirth workshop plan and communication

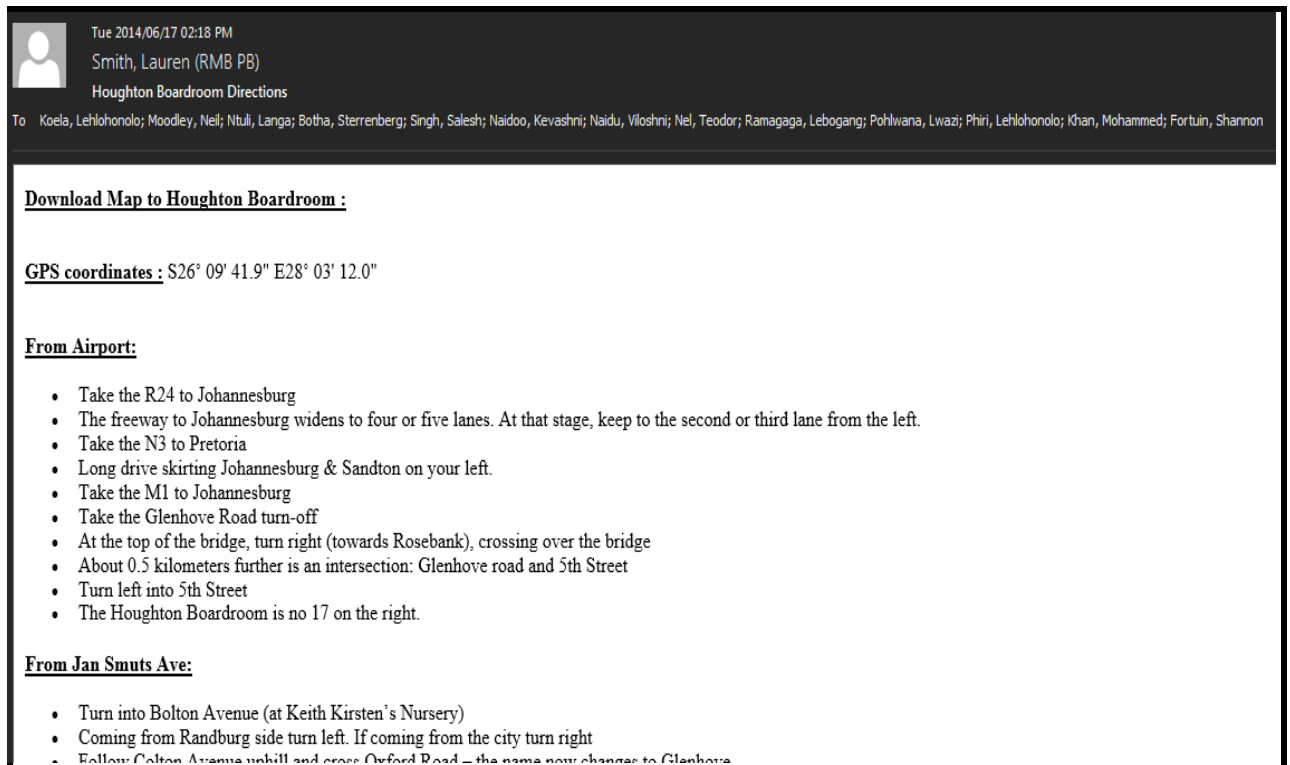
**Table G.1. CoPs created by researcher**

<b>CoPs created:</b>
<b>Communities of Practice created Start of the rebirth journey - 18 - 20 June 2014</b>
<b>COP 1</b> - Lauren, Lwazi, Mohammed, Langa, Viloshni
<b>COP 2</b> - Shannon, Saleshe, Teo, Kevashni, Nolo
<b>COP 3</b> - Gethan, Hloni, Neil, Lebo, Sterre

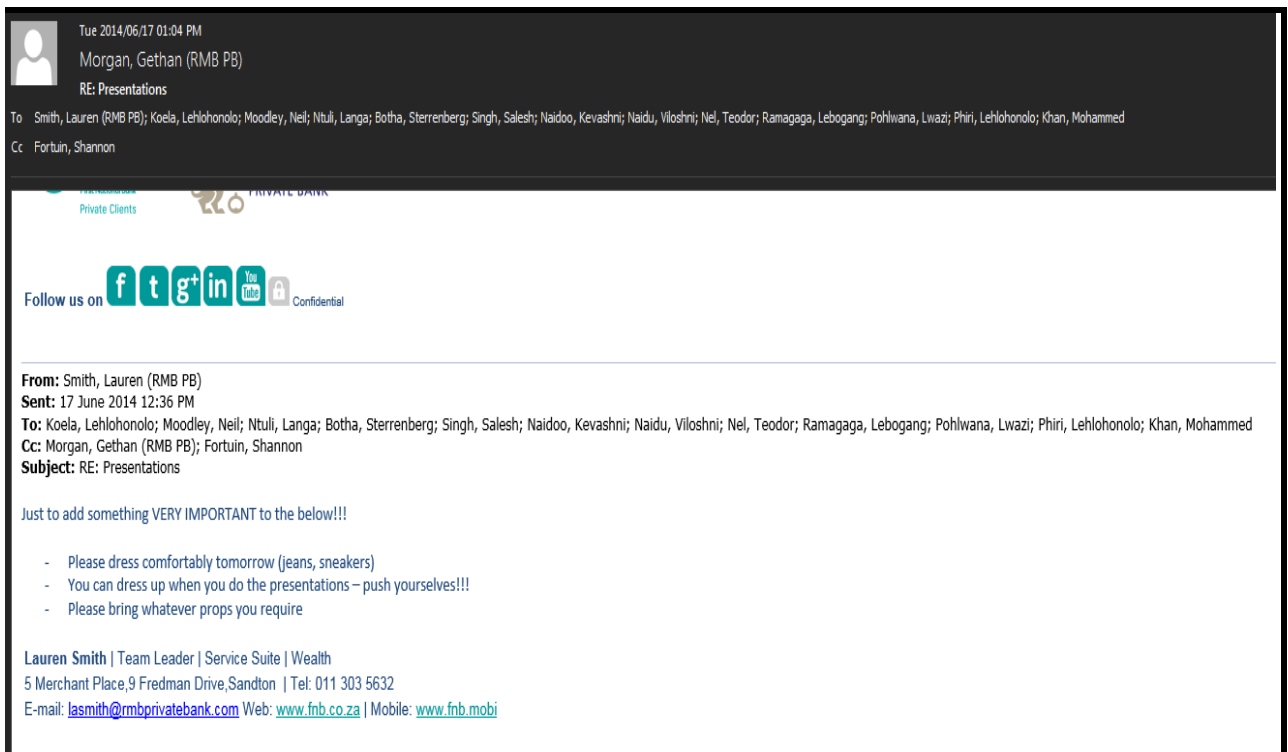
**Table G.2. Researcher's rebirth workshop CoP timeline (June 2014)**

<b>Task ID</b>	<b>Task Responsible</b>	<b>Start Date</b>	<b>End Date</b>	<b>Status</b>
<b>1</b>	<b>Task 1 - CoP 1-3 Created</b>	<b>2014/06/18</b>	<b>2014/06/20</b>	
1.1	R & I Workshop M/C	2014/06/18	2014/06/18	Done
1.2	CoP 1 - 3 created	2014/06/18	2014/06/18	Done
1.3	Each CoP - 25 ideas	2014/06/18	2014/06/21	Done
1.4	Each CoP - 5 main ideas	2014/06/18	2014/06/21	Done
1.5	Each CoP to present 5 main ideas	2014/07/01	2014/07/01	Done
1.6	Each CoP intro to q & q data	2014/07/07	2014/07/07	Done
1.7	Each CoP to complete q & q data for all 5 main ideas	2014/07/07	2014/07/30	Done
1.8	All CoPs met with Mamo (see hyperlink below for deliverables) CoP Deliverables - All CoPs 12.08.14.msg	2014/08/12	2014/08/12	On-going feedback

## Appendix G – Continued

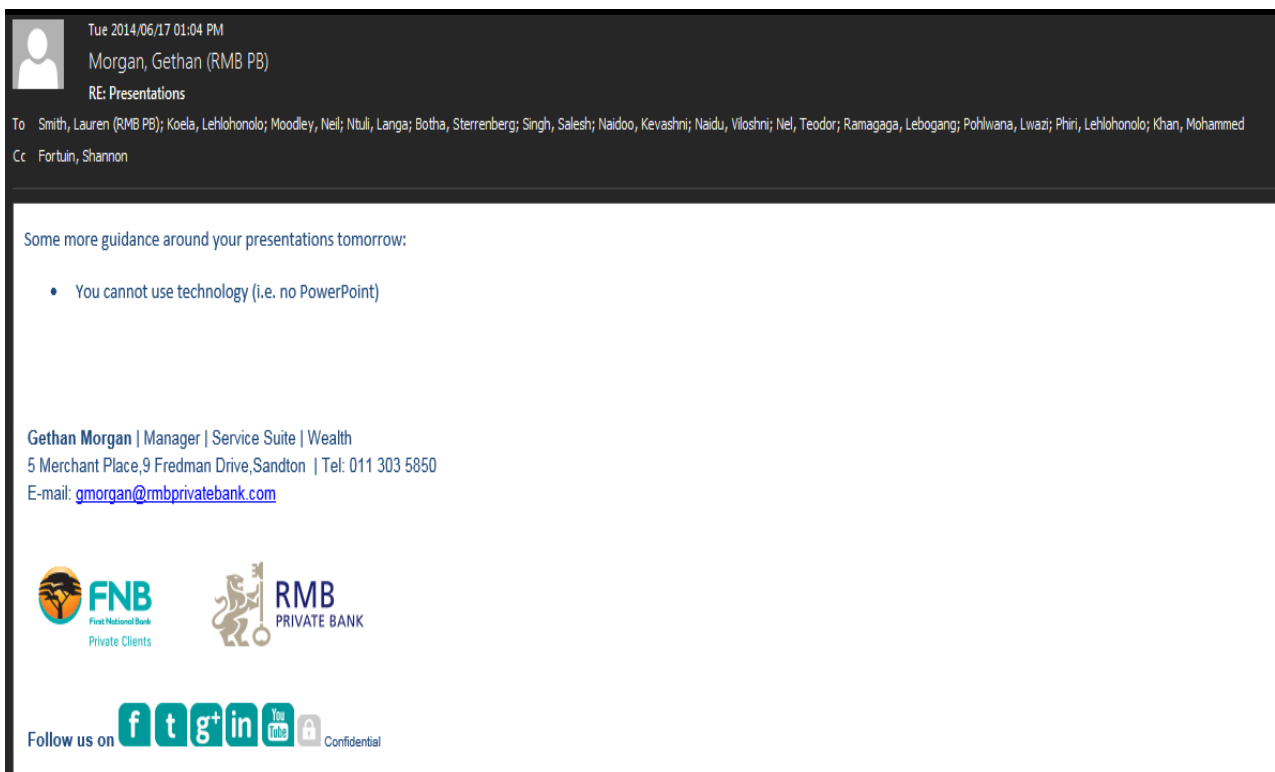


**Figure G.1:** E-mail sent to the CoPs with directions to the venue of the rebirth workshops

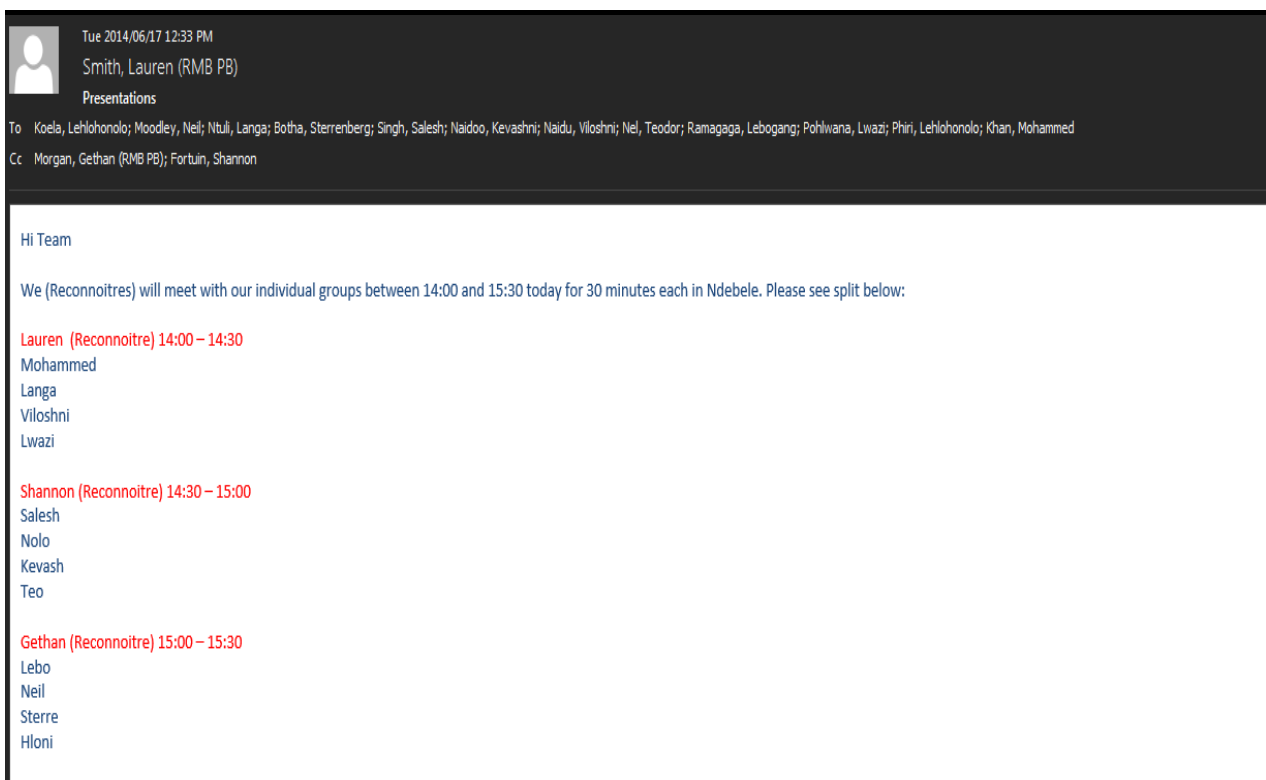


**Figure G.2:** E-mail sent to CoPs advising on dress code for the rebirth workshops

**Appendix G – Continued**



**Figure G.3:** E-mail sent to CoPs with further information on preparation presentations



**Figure G.4:** E-mail sent to CoPs detailing members of each CoP group

## ADAPTABLES (COP 3)

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Unique future value proposition for the period 1<sup>st</sup>  
July 2014 to  
31<sup>st</sup> December 2014.

## 5UFVP'S

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1. Management and PB and PBA database
2. Real Time clearance on Fusion
3. Forex Tab
4. Travel Comments
5. Ideation Sessions

## WHY?

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1. Management and PB and PBA database
  - Provide clients and business with current and accurate information in an efficient and prompt manner.
2. Real Time clearance on Fusion
  - Getting access to process payments real time and become less reducing handover to Cash Management.
3. Forex Tab
  - Speed up process of Forex transactions (In and out). Increase Suite's capabilities and making process easier for clients.
4. Travel Comments
  - Reduces risk of non capture of travel details and provides appropriate scripting for Suite.
5. Ideation Sessions
  - Stimulate and transform the thinking process.

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## MANAGEMENT AND PB AND PBA DATABASE VALUE PLAN

## MANAGEMENT AND PB AND PBA DATABASE - VALUE PLAN

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- Differentiation externally: FNB Wealth clientele
- Differentiation internally: Between employees
- These differentiation characteristics will ensure that FNB's:
  - ✓ Costs are minimized
  - ✓ Processes are faster
  - ✓ Service quality is improved

## MANAGEMENT AND PB AND PBA DATABASE - VALUE PLAN

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### Competitive advantage

- Internally the innovation ensures information being available at the touch of a button as we are dealing with an x and y generation within the suite.
- This innovation is a vital tool for communicating changes as a result of a change in strategy.(This is a big reality as Premium is new and currently reviewing strategy)

## SWOT Analysis-slide 2

### Strengths

- Updated information
- Effective communication
- Easy access to information
- Reduced costs

### Opportunities

- Hub of information
- Complete automation
- Location detection

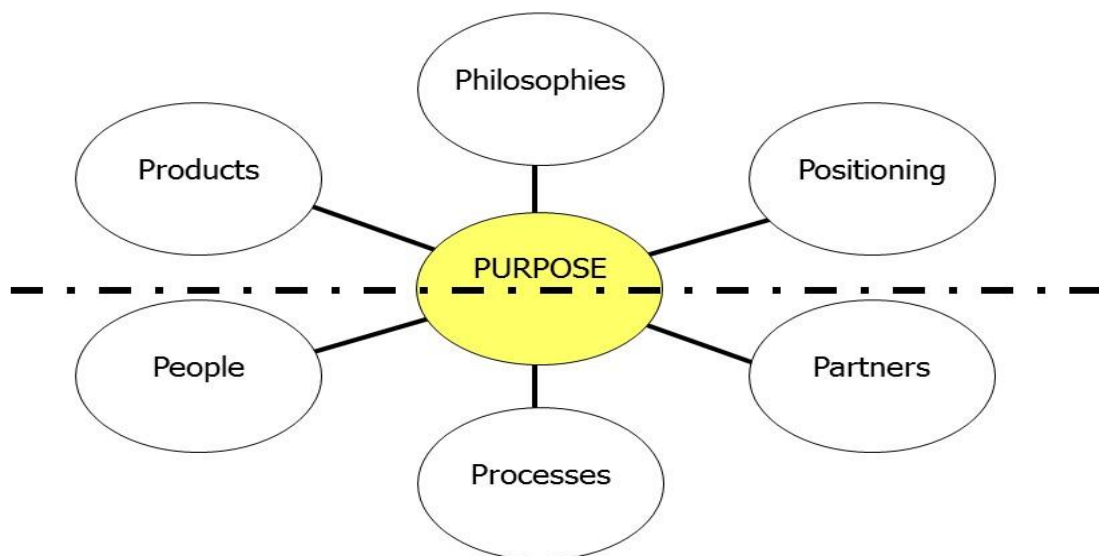
### Weaknesses

- Database size
- Lack of communication

### Threats

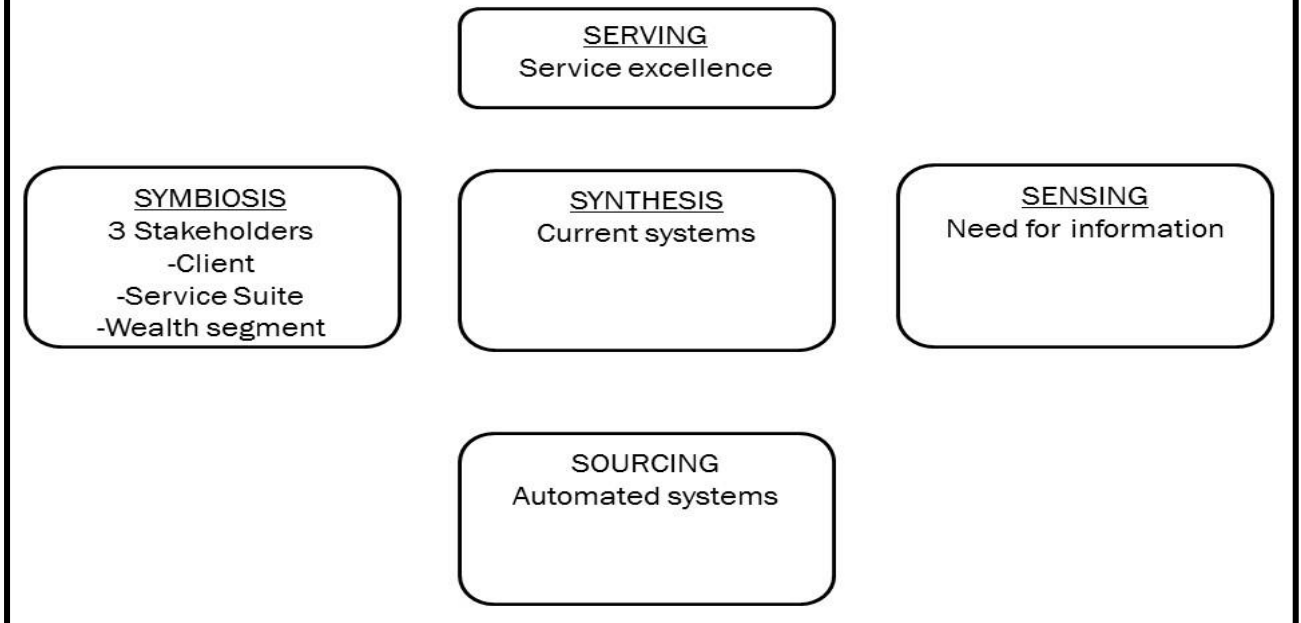
- Fraud
- System collapse

## Business Model-slide3



## Critical Functions-slide 4

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## Appendix I: Rudi van den Berg Daily Journal (CoP)

### JOURNAL

#### Cop Journal 18-22 August 2014

I moved over to non-voice this week which has naturally created some excitement.

I am enjoying learning new things, after taking calls for a while this becomes a rare commodity. The change is also refreshing and so far I am enjoying it.

It has also been an eventful week regarding COP. The pressure became more evident as our presentation date came closer. I had a revelation about the template; it might as well be called 'the north'. It forces you to acknowledge the critical issues, and to address them. Thereafter it becomes a roadmap that will serve as a great guide going forward.

The feeling in my community leading up to the presentation was one of anxiousness. Would it be accepted, were we on the right track all of the usual insecurities came up. It turned out once again that we had nothing to fear. It was a good feeling to see everyone take up their role in the presentation and own what they did, and it turned out well.

The feedback received afterwards showed me that we have come a long way but there is a long way to go. I am looking forward to the findings of the research that we are going to conduct as this will give me a clearer picture of the direction that needs to be taken. I must admit I am grateful that the template is completed up to where we could take it as I am keen to actually start doing something not just put what needs to be done in black and white.

Overall, it has been a good week, spirits are high and life in the suite is good.

Rudi van den Berg