

Compelling Insights and Data

Distilled from

Wisdom at Work Programs

For

U.S. Army Special Forces,

Google, Hewlett Packard, Intuit,

Group Health Cooperative (HMO),

Decurion, Intel, Boeing, and Travelers Insurance

Dr. Joel & Michelle Levey

WisdomAtWork.com

The data that follows is drawn from our work with the U.S. Army Special Forces, Boeing, Intuit, Decurion Hewlett Packard, Travelers Insurance, Group Health Cooperative of Puget Sound and M.D. Anderson Cancer Research Center.

This offers an overview of inspiring and enduring results that have come from a courageous and uniquely integral approach to extraordinary leadership and organizational development.

Similar results have been achieved in our work with hundreds of other leading organizations around the globe.

Contact us to explore the potentials for your people and organization:

206.632.3551

Levey@WisdomAtWork.com

*Can you imagine the magnitude of results that
your organization would realize
if...*

*...your leaders were to apply the discipline,
rigor, and attention associated with acquiring
their professional skills to improving
performance and quality in every domain their
lives, work, and relationships?*

*...your people were working with the "integral
wisdom" necessary for extra-ordinary levels of
vitality and performance, inwardly and
outwardly, individually and collectively?*

“There is an important link between deep change at the personal level and deep change at the organizational level. To make deep personal change is to develop a new paradigm, a new self, one that is more effectively aligned with today’s realities.”

Robert Quinn in *Deep Change*

“The Leveys offer us a path to finding clarity amidst confusion, calm amidst intensity, and a joyful confidence amidst the uncertainty of our modern lives. They offer core competencies for increasing our capacity to work with increasing intensity and complexity in our wired world (or the world of modern business.) Joel and Michelle offers solutions that can grow with us as our lives continue to change.”

— Jim Channon (Lt. Colonel, U.S. Army, retired)

Visionary founder of the First Earth Battalion, Fellow of the World Business Academy, Author of *Evolutionary Tactics: A Manual for the First Earth Battalion*

“Joel and Michelle bring a profound sense of caring to their work along with their deep knowledge and understanding of the human heart and mind, and decades of experience in helping to transform leaders and organizations from conditions of imbalance and stress to healthy, happy, integrated and whole entities.

In my role as a senior organization development practitioner with a major Fortune 500 company, they helped us define an integral model of change leadership. I had never met anyone like them in my life. I was delighted to know that there are people like them, these masters at translating perennial wisdom into practical everyday principles and practices.

I have had many conversations over the years with them on a variety of organizational and leadership topics and have always come away with a special and enduring insight. And on top of all that, they are just a whole lot of fun to work with. I wholeheartedly recommend them and their wisdom at work.”

— Bill Hefferman, Senior Organization Development Leader at Intel

Special Forces at Work

The slides and data that follow are offered to help you to better understand the most meaningful and measurable benefits of our integral approach to developing the extra-ordinary potentials of leaders, teams, and organizations interested in:

- ❖ Rethinking/Reconfiguring Health Care From the Inside Out
- ❖ Change Resilience & Sustainability
- ❖ High Performance Leadership in VUCA Times
- ❖ Mind-Fitness & ExtraOrdinary Performance
- ❖ Sustained Effectiveness & Learning
- ❖ Tapping Collective Wisdom & Intelligence for Breakthroughs in Innovation
- ❖ Developing & Leading Healthy High Performing Teams & Organizations
- ❖ Integral Organizational Sustainability Solutions

Enduring Results

HP, Group Health HMO, Travelers Insurance

Independent Research from Dr. Richard Wagner

University of Wisconsin, School of Management

- ❖ “The post-test measurements we took are like nothing we've seen in looking at over 20,000 change program participants. Nearly every one of the 17 measures went up in statistically significant ways.
- ❖ What's even more impressive is that these measures remain as high or higher, even after six months. We are especially impressed by the significant improvement on the factors of Risk Taking and Locus of Control ("I control my own success at work").
- ❖ In our database, these measures have *never* before shown any change in post-program surveys for the change projects at many large organizations.”

The Power of an Integral Approach: Measures of Team & Personal Performance

University of Wisconsin research demonstrated similar & consistent results from InnerWork Technologies, Inc. programs at:

- Travelers Insurance
- Group Health of Puget Sound

Follow-up studies showed sustained and often increasing improvements over time even when teams and organizations went through major challenges and reorganizations.

Hewlett Packard

Measures of Success

(Note: Small p-value = greater significance)

<u>MEASURE</u>	<u>p-Value</u>
Working as high performing team	.001
Team cohesiveness	.000
Trust in peers	.016
Clarity of vision of work setting	.002
Sense of bonding with team	.023
Feedback received	.000
Interpersonal communications	.000
Honesty level	.002
Support given and received	.000
Task effectiveness	.012
Effort exerted on the job	.010

Hewlett Packard

Measures of Success

(Note: Small p-value = greater significance)

<u>MEASURE</u>	<u>p value*</u>
Job satisfaction	.048
Fun at work	.000
Sense of empowerment	.000
Mastery of stress	.019
Shift in locus of control	.073
Mental fitness	.017

“And in all of my
experience,
I’ve never seen
lasting solutions
to problems,
lasting happiness
and success,
that came from
the outside in.”

Stephen Covey



“I've rarely seen such overwhelmingly positive evaluations in the seven years I've been here.”

Janis Apted, M.L.S.
Executive Director, Faculty Development
University of Texas, M. D. Anderson Cancer Center

Google

We were honored to be invited to design and facilitate Google's Mindfulness and Meditation Laboratory – an intensive personal mastery training program that was offered to Googlers in 24 locations around the globe.

The data collected indicates that,

100% Strongly Agree or Agree for all survey questions* that

- ❖ “I recommend this training to others
- ❖ *Overall, I found this training to be worthwhile.*
- ❖ *I'll be able to apply what I've learned here to my work.*

* Nearly all of the ratings were “Strongly Agree”

M.D. Anderson Cancer Research Center

Program Evaluation: Physicians, Faculty, Senior Leaders

100% Strongly Agree or Agree for all survey questions* that

Facilitators were:

- ❖ Knowledgeable about the subject matter.
- ❖ Well organized.
- ❖ Communicated material in an understandable manner.

Overall, the program was:

- ❖ Effective.
- ❖ Provided me with valuable knowledge
- ❖ Provided me with needed skills

* Nearly all of the ratings were "Strongly Agree"

M.D. Anderson Cancer Research Center

What did you like most about this program?

- ❖ The authentic skills and experience of the facilitators, and the openness/engagement of the other participants
- ❖ Expertise of leaders
- ❖ The Leveys' openness to both "hard" and "soft" science
- ❖ The opportunity to experience this program with a group of colleagues/other people. Hearing other people's thoughts. I found it engaging from start to finish.
- ❖ I would like to see all faculty/employees) participate in this program
- ❖ The ability to understand and discuss such deep, thoughtful topics at work.
- ❖ It was too short.
- ❖ Centering, thought provoking.
- ❖ Wonderful sharing of feelings and ideas.
- ❖ The Mindfulness exercises
- ❖ The examples, the techniques
- ❖ Practical tips for refocusing throughout the day that only take seconds
- ❖ Mindfulness tools
- ❖ A chance to step back and reflect. This will improve my productivity.
- ❖ The guided interaction with others
- ❖ The group, the facilitators and how so many wonderful things came out
- ❖ The conversations
- ❖ The various exercises – I really enjoyed learning how to focus and reflect deeply and effectively

Decurion

The following affirming data on the value of our programs was collected following a three day intensive leadership development program for 50 leaders at Decurion, a leading property management and movie theatre company based in Beverley Hills, California.

Of those surveyed, 100% agreed that they “found much personal value and inspiration” in this session. Nearly 100% agreed (while some were neutral, and no one disagreed) that as a result of participating in this intensive leadership development program offered by Dr. Joel & Michelle Levey, that:

- ❖ I have been more aware of choices I make that affect my performance.
- ❖ My participation in the June DBL with the Leveys had helped me to become a better, more effective leader.
- ❖ Interacting and learning with co-workers at the June DBL with the Leveys has enhanced relationships back at work.
- ❖ I have made positive, health enhancing lifestyle choices.
- ❖ I have greater clarity regarding my personal values and priorities
- ❖ I am more mindful of what is true for me in different situations.
- ❖ I have a greater ability to focus my mind.
- ❖ I have increased my skills for recognizing and mastering stress.
- ❖ I have a greater interest/passion for learning more and developing my full potential.
- ❖ I am more effective in my communication with others.

Decurion (page 2)

- ❖ I am a better listener.
- ❖ I am better equipped to work creatively with conflict.
- ❖ I have learned skills and strategies that help me to live more in balance.
- ❖ I have a greater ability to manage my emotions.
- ❖ I have a greater ability to recognize and release tension.
- ❖ I am more likely to notice and respond to the “whispers” stress and less likely to wait for the “screams”.
- ❖ I believe I have increased my Emotional Intelligence.
- ❖ I have improved my interpersonal and social skills.
- ❖ I am more empathetic toward others in my life and work.
- ❖ Others at work have noticed positive changes in me.
- ❖ I feel more empowered and in control of my life.
- ❖ I am more accountable and focus more on what I “can do.”
- ❖ I am more self-directed and self motivated.
- ❖ I have had the clarity necessary to make some tough decisions that I feel good about to improve the quality of my life and work.
- ❖ I am more aware when my team or I are approaching the “danger zones” of burn out or rust out.
- ❖ I am better able to manage and optimize my energy to work closer to “the zone.”

“Here is the very heart and soul
of the matter of leadership:

If you seek to lead,
invest 50% of your time
(attention) leading yourself,
your own purpose, ethics,
principles, motivation, conduct.

Dee Hock,
founder and CEO Emeritus
Visa International



Qualitative Results from Intuit's Leaders New Work Program

% Percent Agree / Strongly Agree

- 94%** “Participation helped me become a more effective leader.”
- 84%** “More aware of when my team or I approach the “danger zone”, burn out or rust out.”
- 90%** “Developed skills for recognizing and mastering stress.”
- 100%** “More aware of choices that I make that affect my performance.”
- 97%** “Relating and learning with coworkers at LNW has enhanced relationships back at work.”
- 87%** “More accountable and focus more on what I ‘*can* do’.”

Qualitative Results from Intuit's Leaders New Work Program

% Percent Agree / Strongly Agree

97% “Learned strategies that help me to live more in balance.”

87% “More self directed and self motivated.”

87% “More likely to notice and respond to ‘whispers’, less likely to wait for ‘screams’.”

70% “Others notice positive changes in me at work.”

84% “Others notice positive changes in me outside of work.”

Qualitative Results from The Leaders New Work at Intuit

Employee feedback related to two major events

1. Peak Season Performance

Turbo Tax Support Organization:

- Substantially higher volume than previous years
- More technically challenging product and environment
- Higher performance standards

Results:

- The tax organization had its best support year ever
- Surpassed the majority of its goals
- Reported a greater sense of organizational and team unity
- Reported substantially less stress during the season

Qualitative Results From The Leaders New Work at Intuit

Employee feedback related to two major events

2. Corporate Reorganization

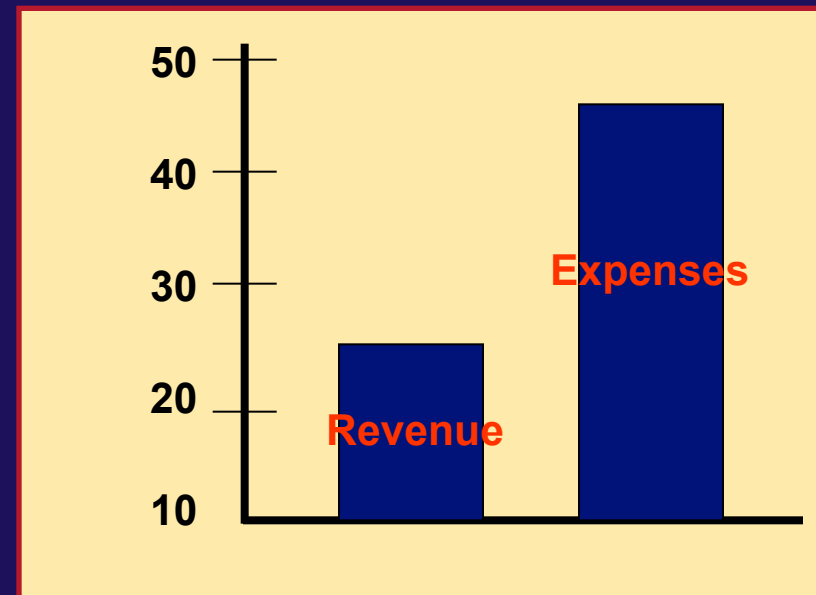
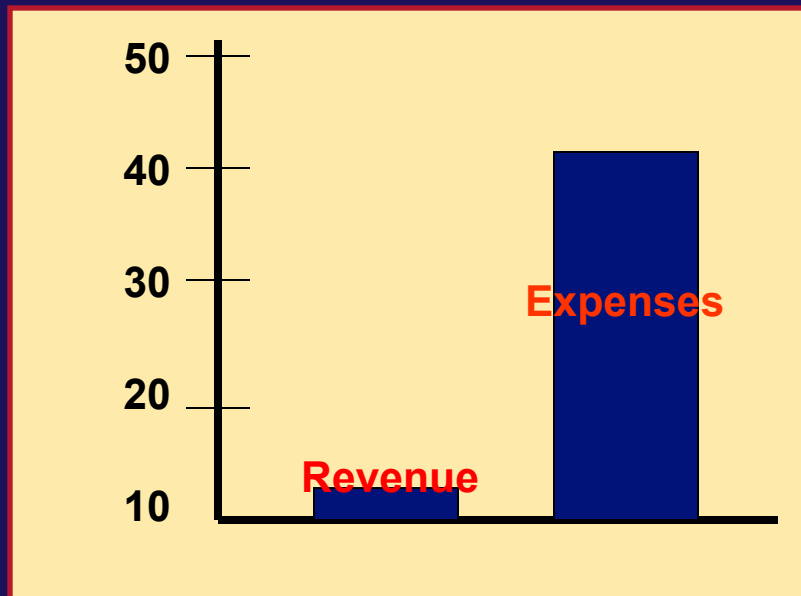
Organizations that participated in the Leaders New Work program reported and demonstrated:

- Significantly less stress than the organizations that did not participate
- A more positive, forward looking attitude toward the change
- Willingness to facilitate the change

Quantitative Performance Results from the CS2000 Program

All of Customer Support

Year 1



Year 2

Quantitative Performance Results from the CS2000 Program

QuickBooks Service Delivery

Expenses

<u>FY '00</u>		<u>FY '01</u>
<u>Q1 - Q3</u>	<u>Q4</u>	<u>Q1</u>
7%	5.6%	1.9%
Over	Under	Under
Plan	Plan	Plan

Efficiency Comparison FY '00 to FY '01

40% Faster Response

12.6% Increase in Agent Efficiency

Quantitative Performance Results from the CS2000 Program

One Team's Example

					% Increase	
	<u>Q1</u>	<u>Q2</u>	<u>Q3</u>	<u>Q4</u>	<u>Q</u>	<u>Total</u>
Revenue/Call	1.47					
Revenue/Call		2.15			46%	46%
Revenue/Call			3.25		51%	121%
Revenue/Call				4.28	32%	191%

Teach Them Courage:

Insights for Leaders from the U.S. Army's Jedi Warrior Training Program

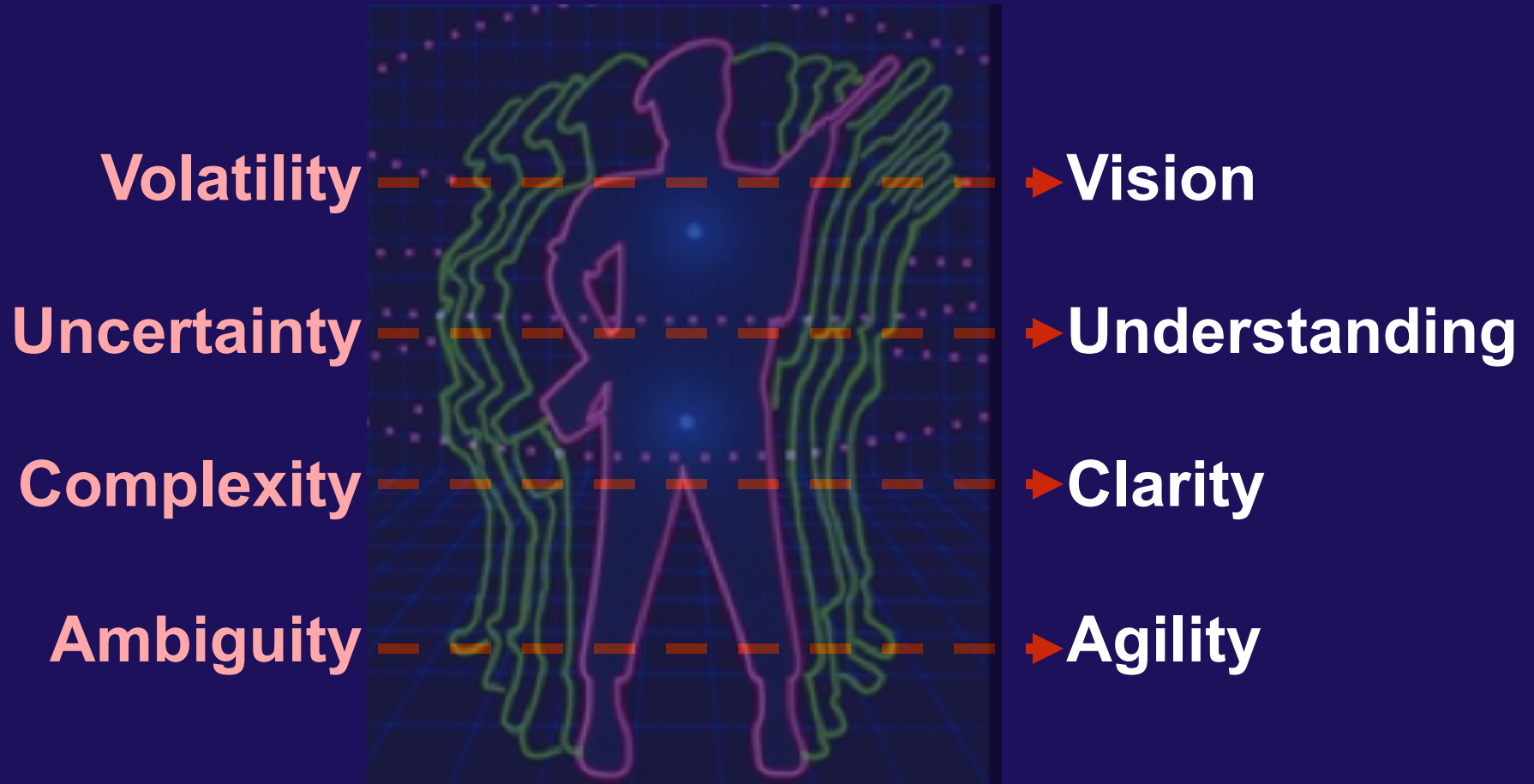
(*aka* ~ "Ultimate Warrior Training Program")
for the US Army Special Forces

Dr. Joel & Michelle Levey
WisdomAtWork.com



Pegasus Systems Thinking in Action ~ Seattle 2009

Jedi Warriors in a “VUCA World”



**Affirming our individual and collective capacity to meet
the challenges and opportunities of these times
in Life-Affirming-Ways!**

Jedi Warrior Mandate:

The Special Forces' Trojan Warrior – (Jedi Warrior) program was initiated as an experimental training program designed to enhance individual soldier and team abilities. The program was based on a wholistic approach to training, and training trainers, and was mandated...

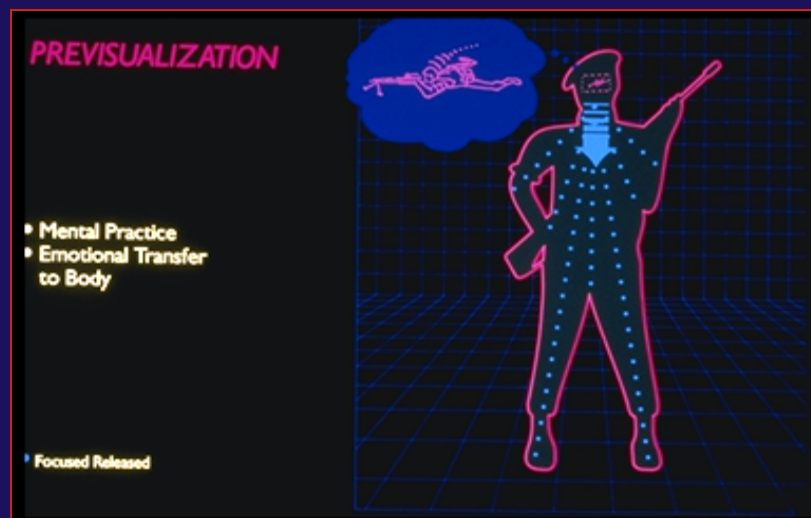
“to make full use of Emergent Human Technologies to enhance physiological and psychological awareness and control in Special Forces Detachment members.”



Military Environment (1)

The modern battlefield has become exceedingly complex and extremely demanding of the individual soldier's ability to adapt, respond, and recover.

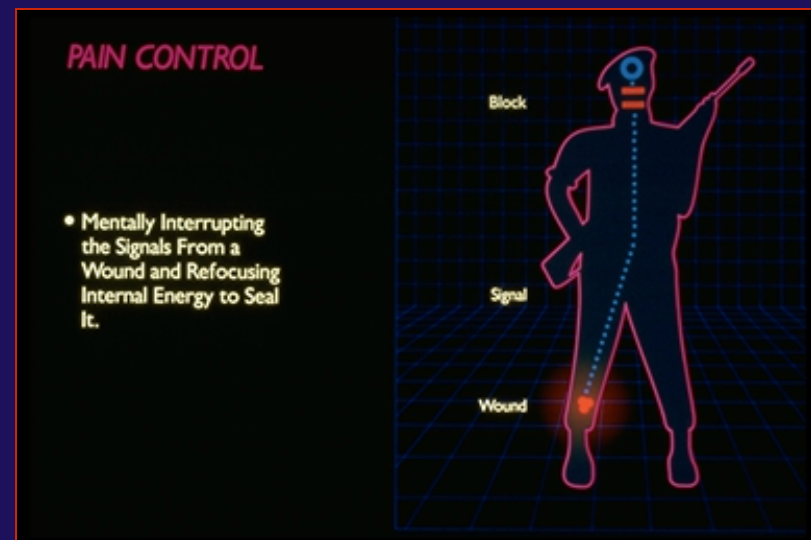
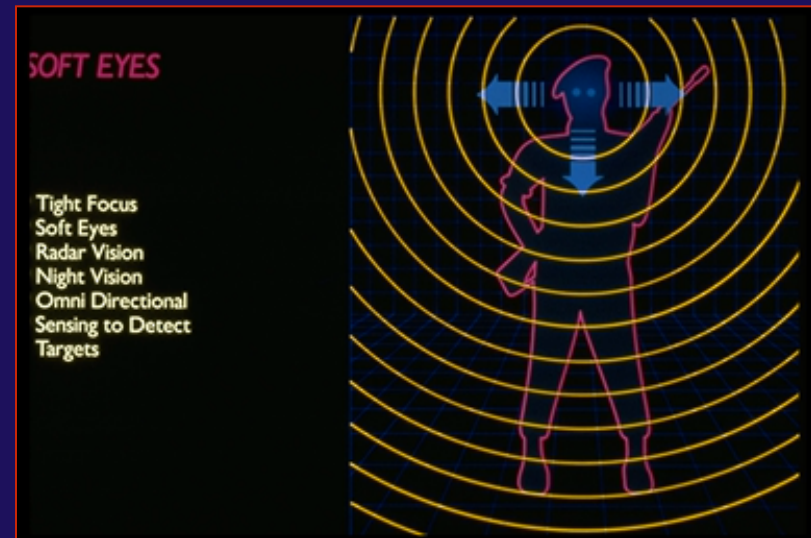
Training methodologies that focus only on limited aspects of the human potential will create a limited soldier who must face a battlefield of unlimited dangers.



Military Environment (2)

The concepts, methods, and material technology needed to train for optimal human performance are available and have now been clearly validated as effective and applicable to the military.

Our military forces will stay on the leading edge of modern warriorship by continuing to develop soldiers who can think clearly, who can act decisively and who can optimize their physical efforts by drawing upon substantial reserves of psychophysical and emotional energies.



“The Jedi Warrior Training program is the most exquisite orchestration of human technology that we have ever seen.”

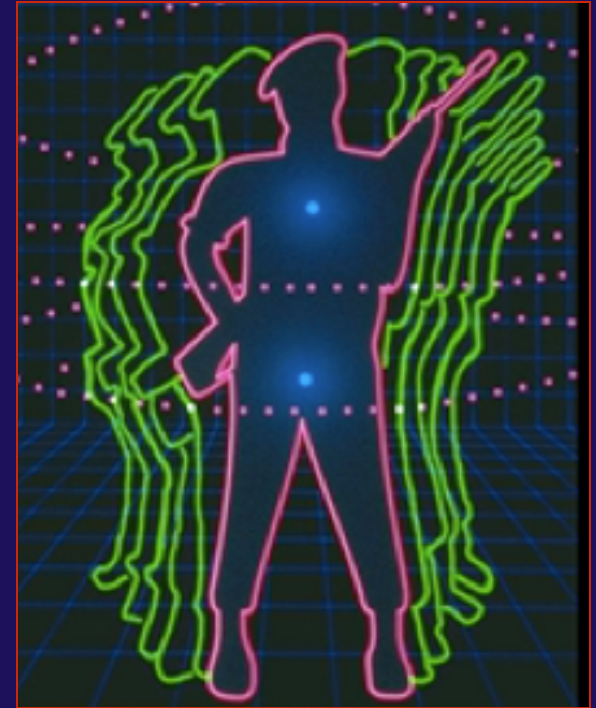
- West Point Logisticians who reviewed the program

“Jedi Warrior was the most extensive and advanced leadership development program to be offered in modern times.”

-- Michael Murphy, co-founder of the Esalen Institute and George Leonard, author *Mastery*, editor *Esquire*

“I have never seen a human development program of this scope or magnitude!”

-National Academy of Science
Program Investigator





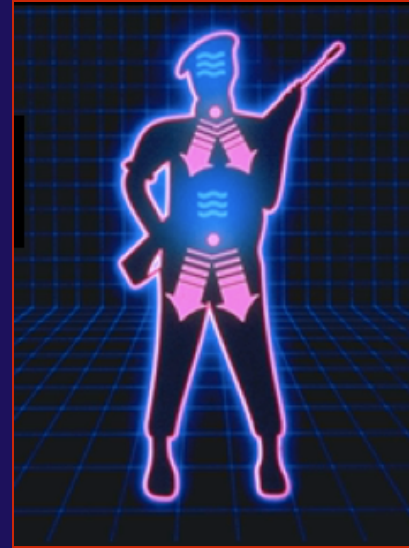
The Leveys' Jedi Warrior training program for the U.S. Army Special Forces was the most intensive Mind-Body-Spirit development program to be offered to the military in modern times!

Primary Tenet of Jedi Warrior

Awareness



Control



“Increased awareness of the mind-body-emotion relationship leads to greater control over every area of performance, and greater control leads to more appropriate, powerful, and skillful action--all of which promote winning and survival on the battlefield.”



Mission Enhancements

Percent Increase

- Mission Effectiveness 49%
- Ability to remain alert and motionless 70%
- Ability to extend sensory awareness 72%
- Ability to quickly relax and rest 120%
- Control of circulation and temperature 87%
- Personal Energy Management 120%
- Ability to optimize physical abilities 92%



Mission Enhancements

Percent Increase

- | | |
|--|-----|
| • Confidence in using holistic methods | 50% |
| • Acceptance of other cultures | 45% |
| • Reduction of effects of shock/trauma | 30% |
| • Confidence in own leadership abilities | 50% |



Mental Enhancements

	Percent Increase
• Mental development (summary)	88%
• Ability to manage stress	92%
• Ability to work with visualization/ mental rehearsal	84%
• Clarity with regards to personal values	83%
• Familiarity and use of holistic methods	98%
• Access to extraordinary states of awareness	82%



Mental Enhancements

»

Percent Increase

- Access to extraordinary perceptual abilities 201%
- Confidence in ability to control mindbody 25%
- Ability to learn and integrate new ideas 109%



Physical Enhancements

	Percent Increase
• Physical enhancements (summary)	109%
• Ability to manage energy	86%
• Understanding of the effects of diet/ nutrition on performance	174%
• Ability to control pain & promote healing	47%
• Ability to fine-tune physical performance	127%



Team Enhancements

Percent Increase

- Team Cohesion 40%
- Sense of confidence/bonding with team 30%
- Ability to blend effectively with team 43%

Advanced Human Performance Technology



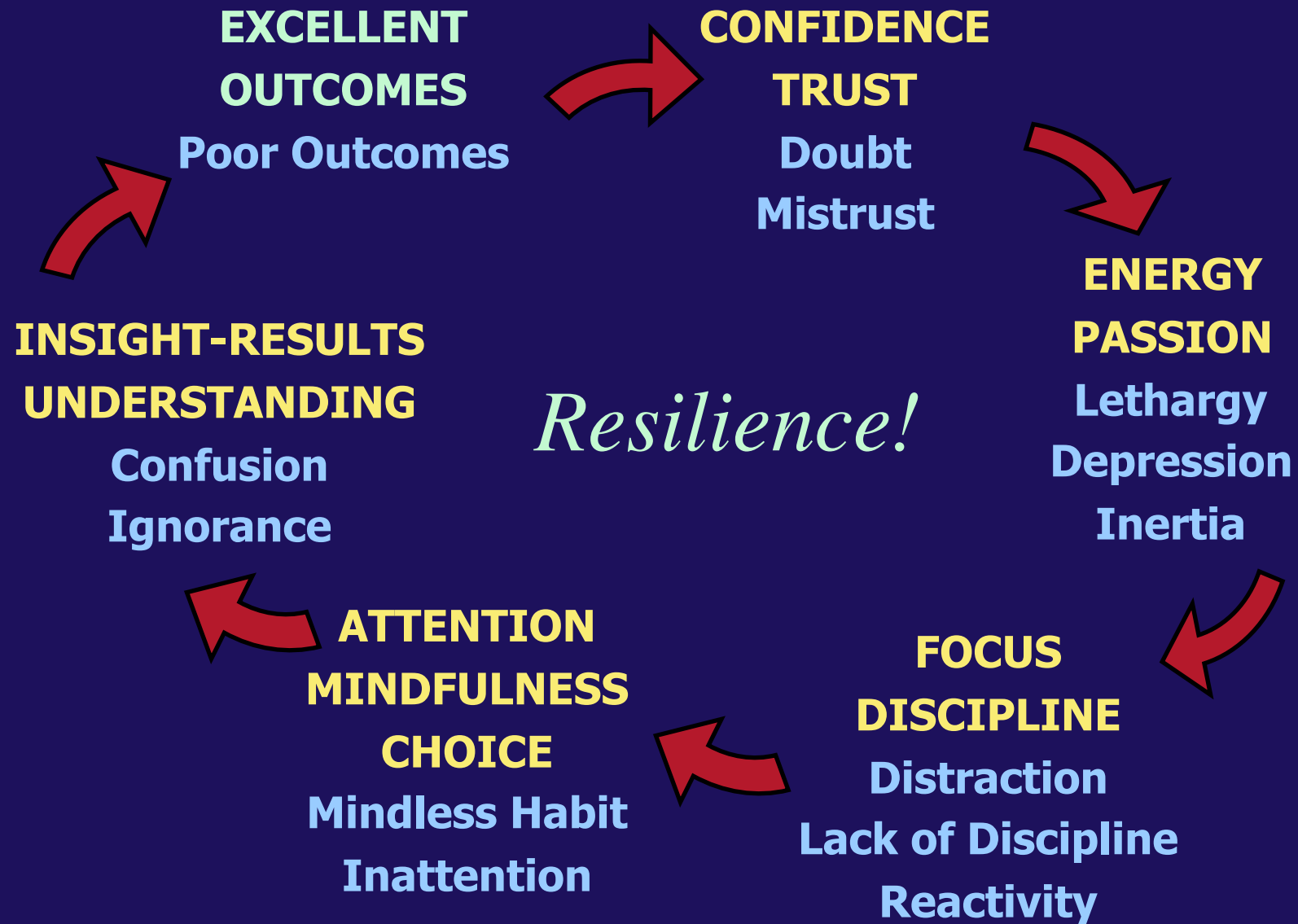
The successful completion of the Trojan Warrior (Jedi Warrior) program has placed the Army in the forefront of human performance technology development. By validating, in a controlled, measured manner, the holistic approach of mind, body, team training, the Army has demonstrated its commitment to providing soldiers with the very best training that is available.

Special Forces at Work in...

- ❖ World Bank
- ❖ NASA
- ❖ Boeing
- ❖ Intel
- ❖ Pratt-Whitney Rocketdyne
- ❖ Hewlett Packard
- ❖ Intuit
- ❖ M.D. Anderson Cancer Research Center

... and hundreds of other leading organizations that we have worked with around the globe applying some of the principles and protocols distilled in our U.S. Army's Special Forces program.

Five Mental Fitness Powers



Wisdom at Work: Integral Approach to Personal, Team, & Organizational Development

INDIVIDUAL

“I”

COLLECTIVE

“We”

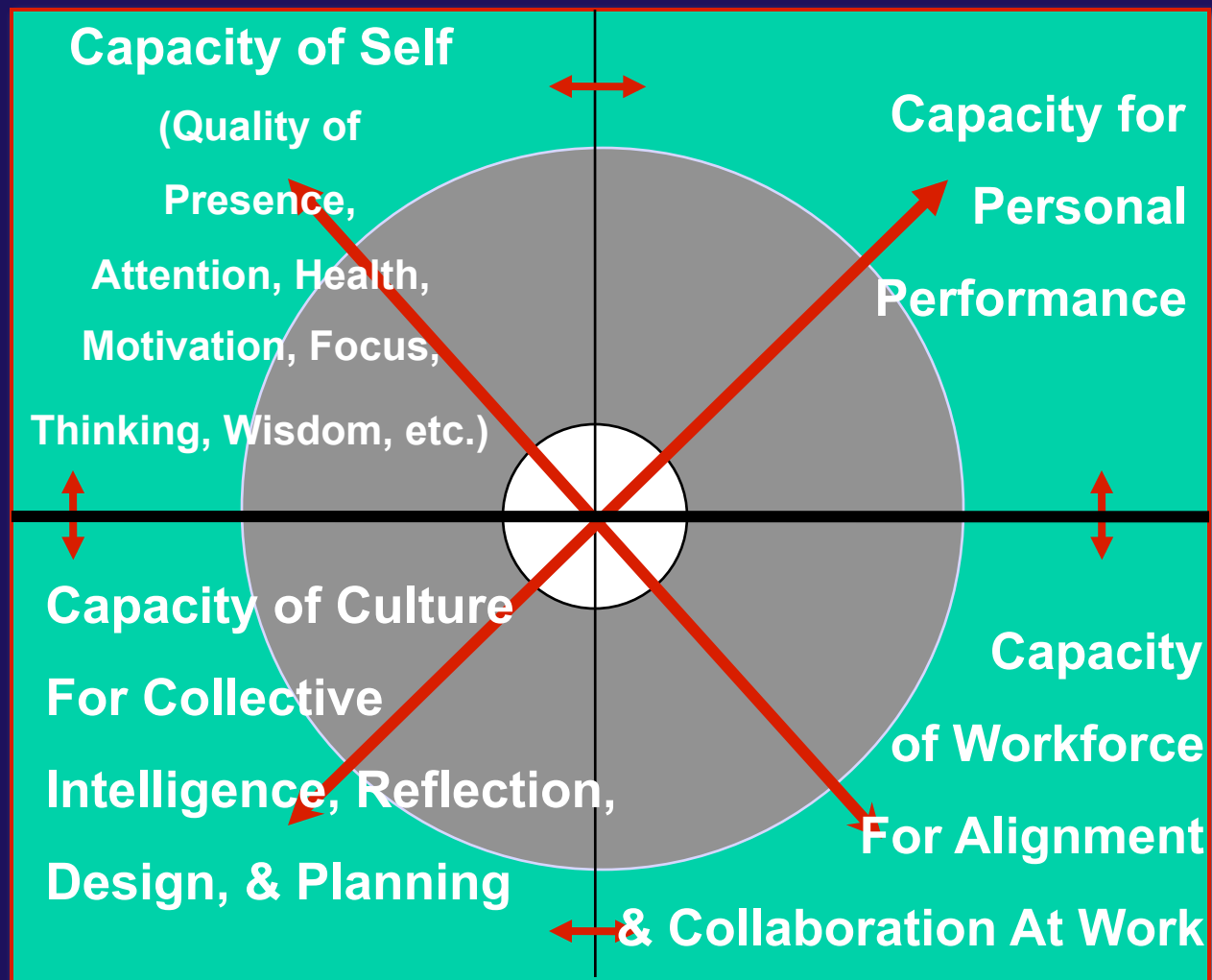
SUBJECTIVE

“Inner”

OBJECTIVE

“Outer”

(Measurable & Observable)



Joel & Michelle Levey

WisdomAtWork.com

Dr. Joel & Michelle Levey

WisdomAtWork.com

Levey@WisdomAtWork.com

Integral View of Leadership Roles at Work

SUBJECTIVE
“Inner”

OBJECTIVE
“Outer”
(Measurable & Observable)

INDIVIDUAL
“I”

Physician as
Reflective Learner
Deep Thinker
Attentive, Intuitive
Creative and
Compassionate Being

Physician as
Role Model
Caring Presence
Deep Listener
& Communicator

COLLECTIVE
“We”

Physician as
Team Member
Culture Steward
Co-Creator

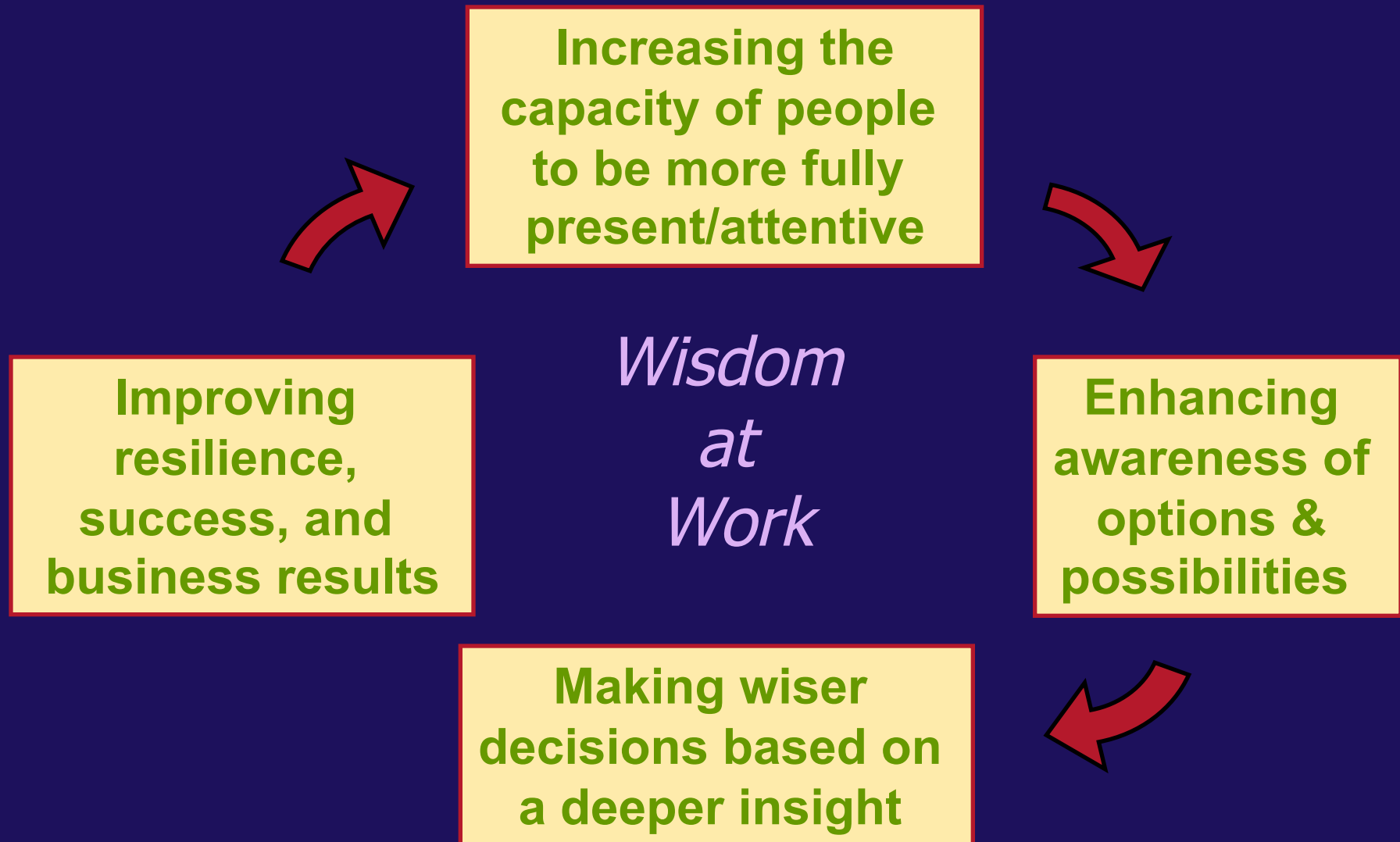
Physician as
Engaged Partner
Working With Others
to Support
Collective Success

Five Mental Fitness Factors





Business Case for Developing Wisdom at Work



Great prospects...

“You are presently engaged in work that has great prospects for bringing the inner sciences and technologies of human development and transformation to a very wide section of people who may not under ordinary circumstances come into contact with these teachings.”

Nobel Laureate Dalai Lama (an advisor to the Leveys for the Army Special Forces program and other projects) praising the Leveys' work.

WHAT IF...

... you were to take an integral approach to leadership, team, and organizational development that seamlessly blended inner *and* outer, personal *and* organizational development. (Note: An estimated 85% of organizational change efforts fall short of their goals, largely because they don't take a truly integral approach to change.)

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...the astronomical amounts of unnecessary problems and rework generated at great expense each day due to mindless inattention could be significantly reduced?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...your people were equipped with the personal resilience, interpersonal skills, & organizational human factors support necessary to quickly, effectively, and resiliently adapt to change?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...your organization were Human Factors savvy enough to reclaim up to 30% more time from your employees -- (by preventing lost time & productivity that would be lost if you had a "toxic organizational culture")?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...the 60-95% of preventable stress-related illnesses of employees and their families could be significantly reduced, lowering health care costs to business and increasing the vitality, effectiveness and productivity of people at work?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...organizations invested in bringing the estimated 80% of employees not presently working at their full potential closer to realizing that potential?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...leaders, teams, and individuals were rewarded and held accountable for living and working with a deeper wisdom of wellness necessary for change resilience, sustained organizational and business success?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...your organizational leaders, practices, and culture consistently demonstrated a commitment to your people and rewarded, trained, and encouraged them to bring their highest potentials to work for your business success?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...people in your organization really understood that developing healthy, change resilient, high performing people and culture is about on-going culture and relationship development and personal discipline--not just about workshops or training events?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

WHAT IF...

...you started thinking about business *success* in terms of a more long-term, whole systems and wellness based view that accounted for the impacts of business decisions, services, and products on *all* stakeholders?

Questions excerpted from Levey & Levey, et al. Corporate Culture & Organizational Health,
Report for the Institute for Health & Productivity Measurement

“Nothing happens
without
personal transformation!”
W. Edwards Deming

Joel & Michelle Levey's pioneering work has inspired thousands of people in hundreds of leading organizations around the globe including: Google, NASA, World Bank, Intel, Qualcomm, M.I.T., Stanford Institute's V.A.L.S. Program, M.D. Anderson Cancer Research Center, and Clinton Global Initiative. They chaired the Center for Corporate Culture and Organizational Health at the Institute of Health & Productivity Management.

Their acclaimed Jedi Warrior (aka Ultimate Warrior) program for the U.S. Army Special Forces was described by West Point leaders as, "the most exquisite orchestration of human technology we have ever seen," and by others as, "the most intensive leadership and human development program to be offered in modern times."

Joel & Michelle serve as clinical faculty at the University of Minnesota Medical School and Bastyr University, graduate faculty at Mahidol University in Thailand and Indian Institute of Management (Ahmedabad), and faculty for the World Business Academy. They also served as Co-Chairs for the West Hawaii Workplace Wellness Task Force, a project of the University of Hawaii at Manoa, Office of Public Health Studies, John A. Burns School of Medicine

Their published works include: *Wisdom at Work; Living in Balance; Luminous Mind; Quality of Mind; The Focused Mindstate, The New Bottom Line, Community Building in Business, Learning Organizations, and Intuition at Work.*

To learn more, visit: WisdomAtWork.com

For more information contact:

Dr. Joel & Michelle Levey

Wisdom at Work

WisdomAtWork.com

Seattle: 206.632.3551

Hawaii: 808.889.0056

Levey@WisdomAtWork.com