

# Coaching Using the 4 Energy Patterns:

*Helping Your Clients Find Their Groove and Get Out of Ruts*

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**Overview:** *4 energy patterns, based in the physiology of movement, but also known to correlate with temperament, are the basis of a powerful assessment and model to help your clients understand their strengths and risk areas. These energy patterns provide a clear roadmap linking assessment with wide-ranging, prescriptive action for getting out of ruts and into balance.*

## **Managing Biology**

Paul, a Vice President of manufacturing with responsibility for process improvements at dozens of plants, had no doubt what he must focus on in his leadership development. "It doesn't matter what else I do, if I don't learn to manage my temper, it'll be my undoing." Paul had taken an instrument we frequently use in our programs to assess the risk associated with different ways a person can derail under stress. Paul's results matched his experience as he pegged the meter on a factor called "volatility." "It's been with me my whole life," he said, "This horrible temper. But how do I manage my biology?"

As his coach, I was committed to helping him find an answer. I was also struck by the implicit division of his question: clearly he equated "I" with his mind, struggling to control some separate body (i.e., "biology"). No wonder good advice and simple behavioral suggestions ("count to 10 when you feel yourself getting upset...") would fall short of a fix, as they'd become just another command from "I" to an unwilling body.

This is exactly what so many people struggle with, whether they're trying to manage their temper, their weight, or any unproductive habit. What if there were a way to work more deeply and inclusively with the body to move body, mind and life together in more productive directions?

There is! Four fundamental energy patterns that manifest in our movement, thoughts, feelings, and

behaviors, provide a powerful roadmap for working with a fully integrated "I." This roadmap helps people (1) understand where they are (2) know where they need to turn to get where they want to go, and (3) actually make the turn.

In Paul's case, two patterns in particular were excessively out of balance: he showed too much of a pattern called the Driver, and too little of a 2<sup>nd</sup> pattern, the Collaborator. These two patterns have a completely different movement basis. The Driver is all about thrusting and pushing; it's essential for driving after a goal, but in excess it becomes impatient and pushy. The Collaborator is based in swinging, rocking motions, and shows up in such behaviors as being able to play in the give and take of relationships and roll with the punches.

Fortunately, Paul had a strong background in sports and martial arts, so he was open to the idea of a physical practice that would help him manage his temper by getting more into the swing of the Collaborator. I showed him a few exercises he could do in his office right before lunch – or during his lunch hour (though I was also encouraging him to take lunch breaks with colleagues – a very Collaborative thing to do). He also agreed to shift his martial art practice to the more Collaborative, rolling, swinging martial art of Aikido.

With an investment of about four hours a week, for the first time in his leadership life, he was able to manage his temper - not by willing his "biology" not to blow up, but by physically shifting his body into a different pattern where impatience has a chance to evaporate. It's hard to measure the return on his invested time, but it may have saved him his career.

## **Experiencing the Patterns**

So what are these energy patterns that manifest in our body, mind and life? Far from being abstract concepts, they are as present as daylight; you can experience them right now.

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<sup>1</sup> Originally appearing in the *International Journal of Coaching in Organizations*, Summer, 2006. Used with permission.

- **The Driver:** Stab the air with your index finger, over and over, like a politician making a point – or an angry coach challenging an umpire’s decision. These sharp, thrusting movements bring out the Driver. Direct and aggressive, this is the pattern of people who love to win. Picture Donald Trump as he says, “You’re fired!” Can you feel the directness of the Driver?

- **The Organizer:** Sit up straight and fold your hands neatly in your lap. Like Queen Elizabeth II, the Organizer holds perfect form, with “a place for everything, and everything in its place.” Moving step by step, the Organizer ticks through a project list, doing the right thing and doing things right.

- **The Collaborator:** Move your head or your hips from side to side, and let your whole body follow. You’re getting into the swing of the Collaborator who knows how to have fun and engage people. When Oprah tilts her head, smiles, and draws people into the discussion – or Lucy rolls her eyes and pulls Ethel into some madcap scheme – they’re engaging the Collaborator.

- **The Visionary:** Let your arm rise effortlessly, as though it’s buoyed up by the air, and your hand move randomly through space. These hanging, drifting motions bring out the Visionary - like a Tai Chi master – open to anything and sensing the flow. The Visionary is the pattern of no-pattern, the pattern of chaos, imagination and breakthrough – imagine someone hang-gliding, or Michael Jordan in hang-time, about to let the ball just drop in.

As you experience each pathway, you might ask yourself – how comfortable is this? Do I even LIKE this pattern? Which one do I overuse? And which could I use more of for balance? Many people get an instant sense of their preferences from simply moving in the patterns.

For deeper insight, we’ve developed the Focus Energy Balance Indicator (FEBI) as a “pencil and paper” assessment of one’s pattern preferences (available online at [www.focusleadership.com](http://www.focusleadership.com)). We use this instrument with our coaching clients to illuminate the patterns underlying the challenges they’re facing or feedback they’re receiving. Unlike most instruments that focus from the neck up, and confine development suggestions to behavioral change, the FEBI is able to go much deeper to show ways of using breath, body, background cues (affecting the senses), as well

as behaviors to shift patterns in directions the client wants to move.

## Seeing the Big Picture

Karen, for example, was a wonderfully talented, down-to-earth leader who was great at getting results. A senior executive at a telecommunications company with more than 7,000 people reporting to her, Karen turned around the quality of the company’s networks and the satisfaction ratings of its customers. Excellent at day-to-day operations, Karen was challenged to be more visionary:

“They’re telling me I need to be more strategic, ‘change the playing field’ and talk about some sexy new technology at the next analyst’s meeting,” she said. This is hard for Karen, because she doesn’t like to speak about things she’s not sure of. “I’m from the Midwest,” she said, accounting for her basic-as-bread values. “When I listen to my colleagues talk about the “big picture” or visionary technology, I hear a lot of fluff. And yet, I get it. I know what they’re asking me to do. I’m just not sure how to do it in a way that’s true to me.”

Karen’s pattern profile was strong in the Collaborator, and also showed easy access to the Organizer and Driver. Her weakness, however, was in accessing the Visionary. This is often the case with people who are told they’re not strategic enough or don’t see the big picture. The thought patterns associated with the Driver and Organizer – the so-called left-brained patterns – are highly focused and sequential. They don’t make the imaginative leaps of the Visionary. Even trying to leap from the mindset of a step-by-step Organizer feels inauthentic (“I’m just not sure how to do it in a way that’s true to me,” as Karen said), and comes off ineffectively.

“But you have the Visionary pattern within you,” I reminded Karen. “It’s not about layering on a new behavioral coating, but more about clearing the overgrowth off an underused pathway that’s already in your nervous system.” What we ended up coaching around was how she could add brief 2-minute Visionary breaks into her day, during which she would let go, expand her senses, let her breathing soften, and simply sense What Is Going On. To get the right mindset for these breaks, she agreed to take an introductory Tai Chi class outside of work. Tai Chi is particularly useful for accessing the hanging, extended motions that are the essence of Visionary energy.

Karen found surprising relief in her 2-minute breaks, though she told of a funny episode where she took such a break during a staff meeting with her boss, and ended up with a huge, and somewhat unwanted assignment. “I have to be careful when I let go,” she mused. But on the whole, she found a way of unlocking her usual way of thinking, and even if she wasn’t equally comfortable in it, she recognized it as her own, and knew when to apply it (“When I’m working on the ‘Outlook on the Future’ slides for the next analysts’ meeting!”). Such is the guidance and gift of the patterns in coaching.

But the insights surrounding the energy patterns don’t stop at the level of the individual. Since the patterns show up in everything we do, they show up at every level of work life: from team climates to corporate cultures, from office layouts to building architecture, from marketing taglines to corporate mission statements (see Table 1). Seeing the world of work through the lens of the four energy patterns leads to endless insight into what’s needed for teams or organizations to be more effective, or to help individual clients become more effective in these broader contexts. The four energy patterns are not just a diagnostic tool, or another 4-quadrant model but a most useful roadmap that derives from the body itself.

### Physical Basis of the 4 Energy Patterns

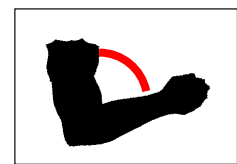
For years it’s been known that even simple motions, such as flexing an arm, arise from the coordination of opposing muscle groups. Kinesiologists would call these muscle pairs an agonist, which acts like an engine, and an antagonist, acting as brakes. In the 1930’s, kinesiologist, Dr. Josephine Rathbone, identified four distinct patterns in which two opposing muscles could be coordinated, resulting in four very different kinds of motion.<sup>1</sup> She gave these patterns the rather kinesiological-sounding names of: Resistor, Posturor, Perceverator, and Assistor<sup>2</sup>. She also devised an ingenious, manual, arm-rotation method of determining which pattern was a person’s most relaxed (i.e., lowest energy) state.

Dr. Rathbone found that while we all have access to all four patterns, we each have characteristic preferences – some patterns are easier for us than are others. The most relaxed, lowest energy, pattern for a person she called the Home pattern. She found that, like steps of a staircase, each of the other patterns was accessed at progressively higher energy levels.

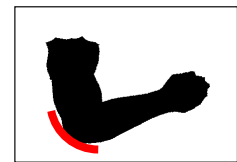
Thirty years later, with the benefit of electrophysiological recording, Dr. Valerie Hunt and her colleagues further validated that these patterns represented different firing orders of nerves acting on muscles.<sup>3</sup> She also found that when one part of the body went into a particular pattern, the rest of the body would tend to follow. (You can experience this for yourself if you try clenching the right side of your body while keeping the left side completely relaxed; you’ll feel the collision of internal signals as the right side tension keeps trying to spread to the left.)

Both research teams speculated on the connection to personality and implications for learning, but it was through 30-years of work by Betsy Wetzig, that we have a much fuller characterization of the connections between these movement patterns and overall temperament.

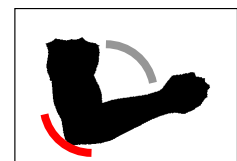
Betsy learned of these patterns at a workshop taught by Dr. Sally Fitt (from Hunt’s laboratory) at the American Dance Festival in 1971. As a choreographer with her own dance troupe, Betsy had long been struck by the connections between movement and temperament in her dancers. She would give the same set of directions to her group, for example, “Run 3 steps, hop, skip and jump,” and a couple of them would be across the stage in a flash, done with the movement, while another had her hand in the air to ask a question. The questioner was always precise in her motions, on time for practice, and posture-perfect. Yet ask her to improvise a Bronx cheer and she’d freeze in confusion. While another dancer could take the same direction, without hesitation, and make a great play of it across the dance floor. What accounted for these differences?



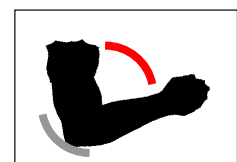
Driver – Antagonist fires first.



Visionary - Agonist fires first.



Organizer: Both fire at the same time, but more antagonist.



Collaborator: Both fire in alternating sequence with more agonist.

**Figure 1.** Four ways to flex an arm, first noted by Rathbone in the 1930’s, were later found by Wetzig to be related to temperament, not just movement.

TABLE 1. THE PATTERNS IN ORGANIZATIONS

	<b>Driver</b>	<b>Organizer</b>	<b>Collaborator</b>	<b>Visionary</b>
<i>Leadership emphasizes:</i>	Action and results, outcomes, bottom line	Orderly processes, clear roles, responsibility	Customer orientation, loyalty, fun	Creating the future, thinking outside the box
<i>Workplace:</i>	Bold, no-nonsense architecture, cubicles	Orderly; quiet spaces to think. A place for everything	Colorful, common places to gather, exchange ideas	Places to network, be alone, or be with nature
<i>Work Processes:</i>	Minimal, focused on outcomes	Step-by-Step, and unambiguous	Practical, oriented toward how people really work	Loose, adjustable to circumstances
<i>Rewards:</i>	Competitors, winners	Solid, dependable contributors	Team players	Inventors, creative problem solvers
<i>Logo, Symbol:</i>	Lightning bolt	Red Cross	Southwest's Heart	Rainbow
<i>Corporate Tagline:</i>	"Just Do It"	"Solid as a Rock"	"The LUV Airline"	"Imagine..."

Learning about the movement patterns, Betsy knew immediately that these were the missing links she'd been looking for in understanding the body and mind working together. She learned the Rathbone manual test for Home pattern and started giving it to all her dancers – indeed everyone she knew – as she started cataloging how they did things, what they felt, and how they thought. Calling them Coordination Patterns™, she re-named these patterns according to their movement essence: Thrust (Driver), Shape (Organizer), Swing (Collaborator) and Hang (Visionary). Over time, she was able to map each movement pattern to the thoughts, feelings and behaviors that repeatedly accompanied it.

During the past several years, we've further extended this map into the world of work, and have usefully applied it in leadership development, team building, organization development, and executive coaching.

### **Validation Studies and Comparison to Other Models and Instruments**

Our field abounds in models and instruments of some facet of personality, some popular examples being the Myers Briggs Type Indicator (MBTI)<sup>4</sup>, the DISC<sup>5</sup>, the Herrmann Brain Dominance Indicator (HBDI)<sup>6</sup> and Social Styles.<sup>7</sup> In my coaching experience, I've found all of these instruments to be highly useful in illuminating semi-conscious

tendencies, and showing important connections to feedback or challenges clients are dealing with. Yet they also have their limitations in treating personality as an "I" separate from the body. While the interconnectedness of mind and body has been established by an enormous research base,<sup>8</sup> none of these instruments show a behavioral link to the body. The four energy patterns provide a great advance both in getting underneath other models to their physical basis, and in adding back the body to a more integrated view of human personality. For those of you who have experience with other instruments, here are a number of ways that the four Coordination Patterns compare and connect to these other models (Readers not familiar with these other instruments may want to skip this section).

**MBTI:** The four energy patterns tease apart what I've come to think of as primary colors comprising the multicolored scales and temperaments of the MBTI. In the MBTI Type II instrument, for example, the scale of Extroversion is divided into subscales showing two different ways to be an extrovert: one can be highly initiating on task, which is the energy of the Driver, or one can be highly social and gregarious, which is Collaborator energy. Our research has shown these two patterns factor independently. We have seen some strong correlations between MBTI Type and pattern preferences. For example, people preferring the "NP-type" (Intuitive-Perceivers in the MBTI terminology) correlate strongly with the Visionary pattern; the Organizer correlates

strongly with “J-types” (Judgers). As with the MBTI, we stress that these are preferences, not boxes one gets locked into. Indeed, the strength and uniqueness of the energy patterns is their focus, not on “what you are” as a frozen image, but on what you can do to gain the versatility or balance that supports your life.

**DISC:** Like the energy patterns, the DISC model uses four scales on which one can measure low to high. The four DISC scales were derived from the work of William Marston, based on the behavioral patterns of actively or passively, challenging or submitting to external conditions. The clearest correlation to the energy patterns is the scale of the active challenger, i.e., the D scale (called Dominance or Directive Style), with the energy of the Driver (interestingly, while Marston did not explicitly include the body, he described this scale as “pushing toward,” i.e., the same movement essence as the Driver). The I-scale (called Inducement, Influence or Interactive Style) also correlates with the Collaborator (plus some Visionary traits). The more passive scales of S and C represent a blend of traits we associate with the Organizer and Visionary. The DISC scales aren’t really set up, however, to detect the drifting, leaping imagination of the Visionary, or the step-by-step linearity of the Organizer.

**Social Styles:** Also related to Marston’s work, Social Styles distinguishes the people-interactive aspects of 4 behavior patterns, calling them: Driving, Expressive, Amiable and Analytical. While the MBTI and DISC are generally self-reported, Social Styles provides feedback from others. As with the DISC, the Driving pattern completely matches what we also call the Driver; Expressive captures much of what we see in the Collaborator (and a few aspects of the Visionary). Amiable and Analytical mix traits that we associate with the Organizer and Collaborator. None of the Social Styles really captures the essence of the Visionary. Given that Visionary energy is vital to helping people deal with their increasingly chaotic and complex work-lives, this is a most useful pattern to explicitly call out in working with leaders and their organizations.

**HBDI:** This is another 4-quadrant model in which one can score low to very high in 4 ways of thinking. Developed by Ned Herrmann, this model started from brain physiology and what was known about the more analytical, “left-brain” vs. the more artistic, “right brain.” It became a metaphorical model distinguishing the more conceptual vs.

“limbic” aspects of left- and right-brain thought patterns. The left-brain modes, given the colors Blue and Green in the HBDI, correlate strongly with the energy of the Driver and Organizer, respectively, with some crossover between them. Likewise the two right-brain modes, Red and Yellow, match the patterns of the Collaborator and Visionary, respectively, with some crossover. In cases of crossover – e.g., where the HBDI maps a trait to Green that we map to Driver, rather than Organizer – the reasons are clear. “Security,” for example, maps to the Green quadrant in the HBDI. In the energy patterns, we regard it as a Driver trait to structure things in order to be secure, and an Organizer trait to find security in pre-existing structure. “Security” is important to both the Driver and the Organizer, but they meet the need in different ways. Generally, the HBDI matches the four energy patterns very well, even though the two models were derived quite differently, suggesting again, an essential, physical underpinning to such behavioral models.

**Other Validation Studies:**

While the research around the energy patterns instrument, the FEBI, is still ongoing, we have completed a validation study (N=250) against the NEO<sup>9</sup>, regarded by many in the psychological community to be the “gold standard” among psychometric self-report instruments. The NEO distinguishes 5 major facets of personality – Neuroticism, Extroversion, Openness, Agreeableness and Conscientiousness – each of which has 6 subscales. As with the MBTI, we find clear and significant (>.4) correlations to the energy



**The Driver (Thrust)**  
Gets to the Point - fast!  
Movement essence: pushing, driving



**The Organizer (Shape)**  
Does the right thing - step by step  
Movement essence: holding form, composure



**The Collaborator (Swing)**  
Plays in the give and take of relationships  
Movement essence: back and forth, perseverating



**The Visionary (Hang)**  
Goes with the flow...is open to new possibility  
Movement essence: drifting, extending, letting go

**Figure 2.** The 4 energy patterns and the essence of their temperament and movement.

patterns at the subscale level. For example, 4 of the 6 subscales of Conscientiousness correlate strongly with the Organizer; one of them (Achievement striving) correlates with the Driver. The 6<sup>th</sup> subscale, Competence, shows no pattern correlation, nor would we predict one – it's possible to be competent in any pattern. All of the correlations we'd expect to see between the NEO and the FEBI have been borne out. Some of the NEO subscales are not differentiated by the patterns (e.g., Competence), however all four patterns are measured by the NEO. In addition, we've been able to refine the FEBI using factor analysis and reliability data to arrive at a set of questions that reliably measures the four energy patterns.

In a smaller study involving 45 volunteers, we physically assessed their Home pattern using the Rathbone arm-rotation method, and also gave them the energy patterns instrument. In all cases where a Home pattern was clearly obtained on the Rathbone test (the test only gives a clear result if the subject is completely relaxed), that pattern was either most preferred (74% of the cases) or 2<sup>nd</sup> most preferred in the FEBI results. Future research plans include expanding on this sample size, and adding electrophysiological measurements of Home pattern.

While the physical foundation of four energy patterns is part of their strength and heritage, it would be a mistake to interpret this model too literally, physically. It becomes metaphorical, for example in speaking of the energy patterns of teams or corporate cultures. Even within the individual, we know these patterns represent four ways the nervous system functions, but we don't suggest they correspond to four different structures or physical parts of the nervous system.

I've come to think of them fundamentally as energy itself – moving through the matter of our nerves and muscles eliciting such movements as thrusting and pushing, while stirring up our "grey matter" with thoughts of challenging barriers and getting straight to the point. The breakthrough of this model is that the energy doesn't have to originate in our thoughts; it can start and spread from how we move.

## **Coaching Applications**

The real payoff of the energy patterns in coaching comes with helping people make productive movement in their lives. This is one diagnostic tool that comes with its own prescription: once we know what needs to be worked on or achieved, we can see which pattern would be most

supportive, and we're given abundant ways to develop it. Many coaches might argue that we should focus on leveraging people's strengths and not on shoring up weaknesses. I would agree, from an energy management point of view. Any of us will tend to win using the patterns that come easiest to us, especially if we have strong and clear preferences. So I always encourage people to consider their strongest patterns in looking at career choices or finding their groove, that is, the unique combination of gifts they have to offer.

However, a strength overdone does not serve us. Overdoing our strengths is the natural outcome of yet another way our nervous system operates, which is to reinforce the connections or pathways it uses, especially if positive emotion accompanies the doing. Or, as one of my clients put it beautifully, "Our groove can easily become our rut." Loving to win can become winning at all costs. Working hard can become hardly doing anything but work. Even people who manage to stay out of these extremes still receive feedback or face challenges they bring into coaching that suggest a "rut" of ineffectiveness in their lives:

- "great at organizing tasks, but lacks imagination,"
- "great at results, but hard on relationships,"
- "good operationally, but not strategic enough"
- "super with customers, but unreliable"
- "terrific visionary, but can't get things done"

Do any of these sound familiar? If you hear them as often as I do, you might especially appreciate how clearly a pattern prescription suggests itself in each case:

- "great at organizing tasks, but lacks imagination," – develop the Visionary
- "great at results, but hard on relationships," – develop the Collaborator
- "good operationally, but not strategic enough" – develop the Visionary
- "super with customers, but unreliable" – develop the Organizer
- "terrific visionary, but lacks sense of urgency" – develop the Driver

So while we win on our strengths, we – and our clients – stay out of ruts by cultivating our natural versatility in all the patterns so that we can use any one of them when it's called for. Ways to develop any pattern include the breath, physical activities, simple exercises, background cues in the work environment, sayings or mottos, and specific work behaviors. Table 2 provides a partial list of development suggestions for each pattern. What follows are

a few ways in which I've applied the patterns in my coaching.

**Starting from a New Challenge.** Ron was given expanded job responsibilities in the growing advertising firm he worked for, calling on him to delegate more of his work to outside vendors, and manage several simultaneous projects. Although he'd been given this assignment 6 months earlier, he wasn't stepping up to it. Instead, he was feeling overwhelmed, trying to do too many things himself, and not finding time to either delegate tasks to others or to establish effective means of project management.

His FEBI results showed the Collaborator as his likely Home pattern, with the Visionary as his 2<sup>nd</sup> preferred pattern. Most people combine their two favorite patterns into a primary style that they use most of the time, and Ron was no exception. Yet the patterns he needed in order to meet this new challenge were exactly the opposite: Driver and Organizer.

We identified four ways in which Ron could start getting his arms around this larger job: (1) knowing his top three priorities to cut through the "overwhelm" (Driver), (2) making time for planning in each week (Organizer), (3) being clear in his delegation discussions; e.g., what, when, how (Driver), and (4) creating a simple tracking system for outstanding projects (Organizer). We also looked at ways he could physically reinforce this Organizer-Driver mindset, and two ideas stuck. One was to clear his previously messy desk of all but the one thing he was going to focus on at a time. The other was a dual blessing for Ron, as he was an on-again, off-again exerciser (typical of Collaborators), who wanted to get back to working out. He used to walk on a treadmill in the morning, which was perfect, I told him, "The very discipline of doing that step-by-step, day after day, will build the discipline you need to carry out these other tasks."



Sixty days into his plan, Ron reports having more control over his schedule than ever before, at a pace that feels sustainable. His boss and coworkers also see evidence of his change, as in the wall-size calendar next to his desk graphically tracking all of his outsourced projects, "He's really getting his arms around it," says his boss - a perfect synopsis of the Organizer emerging. Ron's case illustrates the process of using pattern-based development suggestions:

identify a few pattern-guided business behaviors that would make the most difference, and then support that mindset from underneath using physical activities, or background cues affecting the senses.

**Starting from Feedback.** Beth was part of a leadership program in which she received 360 degree feedback that netted down to a message she took to heart: "you're steady, reliable and super-organized, but not inspiring your team or sharing a compelling vision."

"How do I get the 'Vision-thing'?" she asked me in our opening coaching session. Her FEBI results showed Organizer as her favorite pattern, by far, with Driver as her second pattern. Collaborator and Visionary were both weakly expressed, and yet she could see they were exactly the patterns needed for connecting with and inspiring people, and having a real vision to share with them.

Beth and I ended up coaching around a process she put in place with her team to develop a shared vision. We used that as a basis for realigning the group's priorities. She opened up people's field of view - including her own - by interviewing customers and bringing that input into team visioning dialogues. Her tendency was to try to reach closure quickly. She was challenged to stay open, keep listening, and facilitate a somewhat chaotic discussion among her team. Owning her relative weakness at "the vision thing," she especially listened for people in her group who seemed strong at it, and enlisted their help in crafting the essential vision.

We also brainstormed a number of ways she could augment her in-work activities with outside-of-work activities to put her in the Collaborator or Visionary frame of body and mind. Unsurprisingly, she wasn't drawn to most of the physical activities that exercise these patterns, but she was open to two activities that really helped. One was listening to wordless, expansive, New Age music or jazz whenever she did email. The other took advantage of her love for, and proximity to, mountains. She agreed to get out once a week to go hiking or skiing, consciously including Collaborative and Visionary elements (e.g., going with friends, experimenting with paths, taking moments of reflection in wide open spaces).

Within six months, Beth was consistently working in a more open, engaged manner with her team. When I re-interviewed the people in her group, they uniformly applauded her efforts to unite the group around a shared vision. "Beth is never going to be a rah-rah kind of leader," one person said. "But she's more visible now,

communication is better than ever, and we know where we're going."

**Starting from Imbalance.** "I feel like a one-armed paper hanger," John told me in our first coaching session. "I'm trying to do two jobs, and I'm not doing anything well. My goal for this coaching is not just how I transition to this new job (the ostensible reason I had been brought in as the coach), but how I get my life back."

As I started interviewing the people who worked around John, it quickly became clear that the two goals – finding balance and succeeding in the new job – would be almost synonymous. The only negative feedback on John was that, under stress, he was known to blow up or shut down communication, which had harmed his relationships with fellow executives. Since he already mastered the execution aspects of the business, these very relationships would be key to succeeding in his new role.

As you might expect, John was a strong Driver, with Collaborator and Visionary being his weakest patterns. One of the weaknesses of unchecked Driver is the tendency to "just do it myself" when impatience sets in, one of the reasons John was juggling so much. He set the target of delegating 50% of "his" work to the people he needed to groom as successors, and committed to coaching them in the process. He also made it a point to shift his focus from tasks to relationships, for example, by holding one-on-ones with fellow executives, and socializing needed decisions before major meetings. We worked on how he could flip his tendency to jump to conclusions or be dismissive, and instead remain open, and fully hear out his colleagues. He started asking such Visionary questions as, "What's possible here?" or "What are you seeing that I'm missing?" Outside of work, he returned to regular exercise – which for him was bicycling. "Nice and easy," I suggested. "You can ride a bike in any pattern, but if you want to practice the swinging, drifting motions of the Collaborator and Visionary, get a slow and easy rhythm going, open your senses, and harmonize with what's going on around you."

Three months later, I met with a much lighter-spirited John, twenty pounds lighter, and looking relaxed. We talked about strategic issues facing the company, and how he wanted to rally his colleagues around addressing



them. As for the operations in his business unit, they were being so well handled by his direct reports, he was freed up to find his stride in his new role. Most importantly, he was not frantic, and he was not making rash decisions or blowing up at people.

**Starting with a Team.** One of my coaching clients asked me to work with a team she had just inherited whose purpose was to improve customer service for a major computer company. Each team member represented a key area of customer service that had to come together if service was going to improve, but they had not worked well together in the past.

During the morning of our first offsite meeting, conflicts erupted early as several people started placing blame for past problems, while others simply disengaged. I then passed out results of the FEBI, in which people could see their own pattern preferences, as well as a group report showing the tendencies of the team. Overall the group was sharply divided between strong Drivers and strong Organizers. A rich discussion followed over lunch as everyone compared perspectives, and many of the team's conflicts were seen in a more patterned, less personal light. For example, some of the Drivers couldn't see the point of "this teambuilding, pattern stuff", and had folded their arms and disengaged. Others had taken offense at this until they could see that the tendency of Drivers IS to focus on The Point, and everyone, even the Drivers, could laugh at this stereotype playing out.

More importantly, the team experienced all four patterns, and saw the value of what was largely missing from their ranks, and that was strong Collaborator and Visionary energy. The team started asking important questions, such as, "How well are we really connected to our customers?" "How open are we to finding new ways of doing business?" In a playful spirit, they looked at what a more Collaborative customer service experience would look like, and what would be possible in a more Visionary customer service process. The team also brainstormed some physical activities they could do in future meetings to build a more Collaborative spirit, settling on bowling and a team cooking activity they'd try in the coming month. While many significant challenges still lay ahead, the team came out of the day with a sense of new possibility, cooperation, and understanding the pattern balance they wanted to achieve for themselves and their customers.



TABLE 2. DEVELOPMENT SUGGESTIONS BASED ON THE ENERGY PATTERNS

	<b>Driver</b>	<b>Organizer</b>	<b>Collaborator</b>	<b>Visionary</b>
<i>Work Behaviors</i>	<p>Know your top 3 priorities</p> <p>Measure something you're doing – and cut it in half</p> <p>Get to the point</p> <p>Set stretch goals</p> <p>Reduce distractions</p> <p>Enforce clarity and action</p>	<p>Make a list</p> <p>Organize your day</p> <p>Make sacred time for planning</p> <p>Break big jobs down into steps</p> <p>Always know your next step</p> <p>Under-promise and over-deliver</p>	<p>Put fun into your day, celebrate</p> <p>Build your network</p> <p>Build a bond a team you're working with</p> <p>See both sides</p> <p>Find your way around obstacles; work indirectly</p> <p>Work through people</p>	<p>Add spontaneity to your day</p> <p>Make time for reflection</p> <p>Brainstorm</p> <p>Widen your perspective (e.g., surf the net, solicit many points of view)</p> <p>Create some chaos, stir things up</p>
<i>Background</i>	<p>Office: Stark and sparse furnishings,</p> <p>Music: Rock &amp; Roll, Rap</p> <p>Art: Sharp, high contrast, sports posters, "Winning"</p>	<p>Office: Neat and tidy, a place for everything</p> <p>Music: Classical</p> <p>Art: Still life, perfectly composed, "Quality is..."</p>	<p>Office: fun and colorful, overstuffed furnishings</p> <p>Music: Jazz</p> <p>Art: family photos, comic strip characters, "Hang in there, Baby"</p>	<p>Office: light and airy, harmonious with nature</p> <p>Music: New Age</p> <p>Art: Enigmatic, evocative, outer space posters, "Imagine..."</p>
<i>In the Voice of...</i>	<p>Wake up!</p> <p>Never give up!</p> <p>Cut to the Chase</p> <p>Failure is impossible</p> <p>Get on point!</p> <p>When the going gets tough, the tough get going</p>	<p>Breathe.</p> <p>Take it easy. Slow down.</p> <p>Let's sort this out – first things first.</p> <p>You're doing fine. Stay with it.</p> <p>Take it one step at a time. . . (one task at a time etc.)</p>	<p>I see your point</p> <p>How can I use this? (. . .play with this? . . .turn this around?)</p> <p>Don't take it so hard</p> <p>On the one hand... on the other hand...</p> <p>Roll with it, baby</p> <p>Let's try it again</p>	<p>What's possible?</p> <p>What wants to happen here?</p> <p>It's perfect; you just have to figure out why</p> <p>Let's see what develops</p> <p>Let go; hang loose</p> <p>What if...?</p>
<i>Physical Activities</i>	<p>Movement: thrust, push</p> <p>Running</p> <p>Karate</p> <p>Weightlifting</p> <p>Cardio machine (hard and fast)</p> <p>Kendo, sword work</p> <p>Bicycling (hard and fast)</p> <p>Aggressive sports</p> <p>Skiing (hard and fast)</p> <p>Tennis</p> <p>Racquetball</p>	<p>Movement: shape, hold form</p> <p>Ballet</p> <p>Yoga</p> <p>Meditation</p> <p>Walking</p> <p>Dressage</p> <p>Ceramics</p> <p>Housecleaning</p> <p>Organizing a space</p> <p>Woodworking</p> <p>Needlepoint</p> <p>Anything done step-by-step</p>	<p>Movement: swing, rock</p> <p>Ballroom dance</p> <p>Ice dancing</p> <p>Aikido</p> <p>Golf (the swing)</p> <p>Skating, rollerblading</p> <p>Swimming</p> <p>Bicycling (slow and easy)</p> <p>Skiing (slow and easy)</p> <p>Weaving</p> <p>Bowling (the set up, social aspect)</p>	<p>Movement: hang, drift</p> <p>Tai Chi, Chi Kung</p> <p>Meditation (samadhi)</p> <p>Sailing</p> <p>Hangliding</p> <p>Scuba diving</p> <p>Snorkeling</p> <p>Archery</p> <p>Photography (in the moment)</p> <p>Being out in nature</p>

## Conclusion

Driver, Organizer, Collaborator, Visionary: the four energy patterns are simply the most useful, integrated, diagnostic and prescriptive tool I've found for helping clients make successful changes in their work, teams, business and overall life. The patterns have also proven to be exceptionally useful in my own life. An Organizer-Driver from way back, I've focused my own practice on cultivating easier access to the Collaborator and Visionary. Now when I run into barriers – for example, not getting cooperation on an ambitious task – I can roll back, engage people differently, or let go and ask, "What wants to happen here?" (a question that would never have occurred to me 10 years ago!)

In addition to the satisfaction inherent in guiding your clients to a more effective, balanced life using the patterns, there is the joy of living that balance yourself.

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<sup>1</sup> Rathbone, Josephine. *Residual Neuromuscular Hypertension*. NY, Bureau of Publication, Columbia University, 1936.

<sup>2</sup> The Resistor pattern starts with antagonist muscle firing – applying the brakes – then gunning the engine against it. This results in the pushing, thrusting motions of what we call the Driver. At the other extreme, the Assistor applies the engine first, seeming to "go with" the motion, and then brings in the brakes as necessary. This results in the hanging, extended motions characteristic of the Visionary. In between, the Posturor, applies both engine and brakes from the start – more brakes than engine – and meters its way through the motion, which corresponds to our Organizer. The Perceverator also brings in engine and brakes – but in an alternating sequence, with more engine than brakes. This back-and-forth, swinging motion is characteristic of the Collaborator.

<sup>3</sup> Hunt, Valerie and Weber, Mary, "Validation of the Rathbone Manual Tension Test for Muscular Activity," *Archives of Physical Medicine and Rehabilitation*. 45:525-529, 1964.

<sup>4</sup> Briggs Myers, Isabel. *Introduction to Type\_ Consulting* Psychologists Press, 1998, 6<sup>th</sup> Edition.

<sup>5</sup> Marston, William. *Emotions of Normal People*. Taylor and Francis, Ltd., 1928. Geier, John, *DiSC\_Personal Profile System*. Geier Learning Systems, 1992.

<sup>6</sup> Herrmann, Ned. *The Creative Brain*. Lake Lure, NC: The Ned Herrmann Group, 1989.

<sup>7</sup> Berens, Linda. *Understanding Yourself and Others*. Telos Publications, 2001.

<sup>8</sup> See, for example, *The Future of The Body*, by Michael Murphy (CA: Tarcher, 1992) for a compendium of research around mind and body interconnectedness.

<sup>9</sup> Costa, Paul. and McRae, Robert. "Normal Personality Assessment in Clinical Practice: The NEO Personality Inventory." *Psychological Assessment*. 4, 5-13.