

The  
Fifth  
Discipline  
Fieldbook



Also by Peter Senge

*The Fifth Discipline: The Art and Practice of the Learning Organization*

A CURRENCY BOOK

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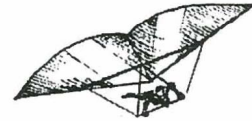
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jumpstarts you to current reality, to what you have to do, whom you have to know, and what resources you need.—CR

## Checklist for Personal Values



Charlotte Roberts

When you consider part of your vision, and something inside you says, “That’s really not me,” most likely you have felt a pang from a deeply held personal value.

Values are deeply held views, of what we find worthwhile. They come from many sources: parents, religion, schools, peers, people we admire, and culture. Many go back to childhood; we take on others as adults. As with all mental models, there’s a distinction between our “espoused” values—which we profess to believe in—and our “values in action,” which actually guide our behavior. These latter values are coded into our brains at such a fundamental level that we can’t easily see them. We rarely bring them to the surface or question them. That’s why they create dissonance for us.

As literature and spiritual guides warn us repeatedly, individuals should beware of the temptation to let their values slip when times get tough. Organizations should doubly beware. If your organization values honesty, that means it should show employees the financial books—even when the books are embarrassing. If your organization believes that “employees are our most important asset,” it means that your first strategy in difficult times will not be layoffs. You may eventually have to lay off people, but it will be carefully considered because it contradicts your organization’s value in action.

### STEP 1: “WHAT I VALUE MOST . . .”

From this list of values (both work and personal), select the ten that are most important to you—as guides for how to behave, or as components of a valued way of life. Feel free to add any values of your own to this list.

### PURPOSE

*This exercise is designed to help you reach a better understanding of your most significant values.*

### OVERVIEW

*A winnowing process in which you gradually eliminate less important concerns.*

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Achievement                 | <input type="checkbox"/> Friendships   | <input type="checkbox"/> Physical challenge                        |
| <input type="checkbox"/> Advancement and promotion   | <input type="checkbox"/> Growth  | <input type="checkbox"/> Pleasure                                  |
| <input type="checkbox"/> Adventure                   | <input type="checkbox"/> Having a family   | <input type="checkbox"/> Power and authority                       |
| <input type="checkbox"/> Affection (love and caring) | <input type="checkbox"/> Helping other people  | <input type="checkbox"/> Privacy                                   |
| <input type="checkbox"/> Arts                        | <input type="checkbox"/> Helping society   | <input type="checkbox"/> Public service                            |
| <input type="checkbox"/> Challenging problems        | <input type="checkbox"/> Honesty   | <input type="checkbox"/> Purity                                    |
| <input type="checkbox"/> Change and variety          | <input type="checkbox"/> Independence  | <input type="checkbox"/> Quality of what I take part in            |
| <input type="checkbox"/> Close relationships         | <input type="checkbox"/> Influencing others  | <input type="checkbox"/> Quality relationships                     |
| <input type="checkbox"/> Community                   | <input type="checkbox"/> Inner harmony   | <input type="checkbox"/> Recognition (respect from others, status) |
| <input type="checkbox"/> Competence                  | <input type="checkbox"/> Integrity   | <input type="checkbox"/> Religion                                  |
| <input type="checkbox"/> Competition                 | <input type="checkbox"/> Intellectual status   | <input type="checkbox"/> Reputation                                |
| <input type="checkbox"/> Cooperation                 | <input type="checkbox"/> Involvement   | <input type="checkbox"/> Responsibility and accountability         |
| <input type="checkbox"/> Country                     | <input type="checkbox"/> Job tranquility   | <input type="checkbox"/> Security                                  |
| <input type="checkbox"/> Creativity                  | <input type="checkbox"/> Knowledge   | <input type="checkbox"/> Self-respect                              |
| <input type="checkbox"/> Decisiveness                | <input type="checkbox"/> Leadership  | <input type="checkbox"/> Serenity                                  |
| <input type="checkbox"/> Democracy                   | <input type="checkbox"/> Location  | <input type="checkbox"/> Sophistication                            |
| <input type="checkbox"/> Ecological awareness        | <input type="checkbox"/> Loyalty   | <input type="checkbox"/> Stability                                 |
| <input type="checkbox"/> Economic security           | <input type="checkbox"/> Market position   | <input type="checkbox"/> Status                                    |
| <input type="checkbox"/> Effectiveness               | <input type="checkbox"/> Meaningful work   | <input type="checkbox"/> Supervising others                        |
| <input type="checkbox"/> Efficiency                  | <input type="checkbox"/> Merit   | <input type="checkbox"/> Time freedom                              |
| <input type="checkbox"/> Ethical practice            | <input type="checkbox"/> Money   | <input type="checkbox"/> Truth                                     |
| <input type="checkbox"/> Excellence                  | <input type="checkbox"/> Nature  | <input type="checkbox"/> Wealth                                    |
| <input type="checkbox"/> Excitement                  | <input type="checkbox"/> (being around people who are)                                       | <input type="checkbox"/> Wisdom                                    |
| <input type="checkbox"/> Expertise                   | <input type="checkbox"/> Open and honest   | <input type="checkbox"/> Work under pressure                       |
| <input type="checkbox"/> Fame                        | <input type="checkbox"/> Order (tranquility, stability, conformity)                          | <input type="checkbox"/> Work with others                          |
| <input type="checkbox"/> Fast living                 | <input type="checkbox"/> Personal development (living up to the fullest use of my potential) | <input type="checkbox"/> Working alone                             |
| <input type="checkbox"/> Fast-paced work             |  |  |
| <input type="checkbox"/> Financial gain              |  |  |
| <input type="checkbox"/> Freedom                     |  |  |

\* This exercise was adapted from a design by Robert Niles, vice president of Human Resources at the Helene Curtis corporation.

**STEP 2: ELIMINATION\***

Now that you have identified ten, imagine that you are only permitted to have five values. Which five would you give up? Cross them off.

Now imagine that you are only permitted four. Which would you give up? Cross it off.

Now cross off another, to bring your list down to three.

And another, to bring your list down to two.

Finally, cross off one of your two values. Which is the one item on this list that you care most about?

**STEP 3: ARTICULATION**

Take a look at the top three values on your list.

- a. What do they mean, exactly? What are you expecting from yourself—even in bad times?
- b. How would your life be different if those values were prominent and practiced?
- c. What would an organization be like which encouraged employees to live up to those values?
- d. Does the personal vision which you drew forth (see page 204) reflect those values? If not, should your personal vision be expanded? Or are you prepared to reconsider your values?
- e. Are you willing to choose a life, and an organization, in which these values are paramount?

**PAIRED VERSION**

This exercise can be very effective done in pairs. Each person takes a turn as “values presenter” and as coach. We generally start with the five most important values to the presenter. One by one, the coach asks the presenter to eliminate one more value, until the list goes down to one . . .

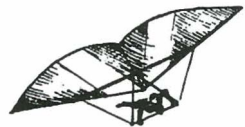
The coach then asks, “What did you feel when I directed you to give up a core value?” Then, “Have you ever felt this feeling before, at home or at work?” And finally, “How do you want to handle this situation in the future if it arises?”



## Cycling Back: Current Reality and Re-vision

Bryan Smith

We suggest completing this exercise once a year, perhaps on or near your birthday. It should be conducted with an attitude of celebration and acknowledgment of how far you have come. Don't cover over problems and failures, but don't make them larger than they deserve to be. The point is not to say, “Look how I've failed this year,” or “Look



**PURPOSE**

*Your first vision is generally not your final one. As you work toward your vision, your understanding of what you want gradually grows more sophisticated. Inevitably, you will*