



# Business Book Summary

## The Quest Effect:

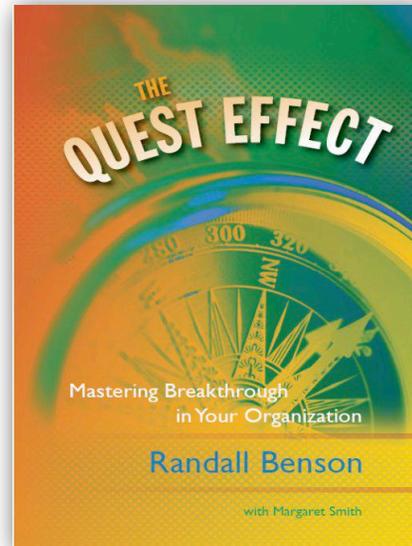
### Mastering Breakthrough in Your Organization

Randall Benson with Margaret Smith

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## Quest

Randall Benson has been helping organizations through transformations for over 20 years. During that time he realized that something he calls “the organizational quest” meant the difference between stalled efforts and extraordinary transformations. He came to believe that technical methods and tools were not the true drivers of breakthrough transformation. Following proven-path change programs simply did not influence the probability of breakthrough. In fact, those that stumbled the most were more likely to make the big breakthroughs.

Moreover, the popular adages about failed change, such as lack of executive support, were not verifiable. In the author’s experience, quest organizations made dramatic breakthroughs in spite of facing traditional change-management challenges.

Upon study of successful transformations, Benson observed that they looked surprisingly like mythical or historical quests. The organizational quest, more than other factors, appear to fuel breakthrough

transformations. A quest is a process of exploration, discovery and application. Quests can be organized into four phases:

1. The call to adventure (or launch)
2. The outward journey of discovery
3. The return journey of breakthrough and mastery
4. Returning to home base with the prize of renewal

The quest is not merely a romantic notion. It defines the fulfillment of a deep human drive that prominent microbiologist and evolution expert, Charles Pasternak, calls “the propensity to quest”. The quest is the desire to seek beyond immediate needs, to see what is over the next hill or around the next bend. It is the drive that propels development in every area of human endeavor, not the least notable being organizational behavior.

The journey of Lewis and Clark is a familiar historical example and is used by Benson throughout his book.

He points out that the quest unquestionably applies to historical journeys in the same way it works in business and non-profit organizations.

While the quest is a useful metaphor, it is also a powerful change navigation tool. Every quest is a journey beyond what is known and agreed upon, into uncharted territory, where the big discoveries are attainable. By choosing the path of quest, you can transform your organization or your industry (or even change the world).

## Parallel Quests

Space shuttles are built to explore the wonders of space, not built to stay on the ground at Cape Canaveral. Likewise, leaders were never meant to stay at home base, accepting the way things have always been done. Questing is what great leaders do.

Every quest begins with a sense of unease, a looming crisis, dislocation or becoming stuck. The quest carries the organization beyond that initiating crisis, to a place of eventual renewal. The quest carries the potential to heal the looming wasteland of “stuckness” and stagnation.

It also releases vast unrealized potential of its people; people who all share the propensity to quest. That potential is transformed, during the quest, into newfound capabilities that ultimately make achieving the quest possible. Stories of people finding their true potential during real-life quests abound. Often, employee-driven innovations lead to the big breakthrough.

## Key Concepts

In *The Quest Effect*, author Randall Benson discusses the concept of the organizational quest. The author includes advice such as:

- Be wary of popular adages about why transformation fails.
- Tap the deep propensity to quest that resides in every individual.
- Frame organizational transformations as quests.
- Make use of the archetypal pattern embedded in every quest.
- Use quests when you need a breakthrough .
- Treat breakthrough initiatives as adventurous journeys, not as projects.
- Track progress against the milestones of the quest at each stage of transformation.
- You must break away from home base or you will forgo the best opportunities for breakthrough.
- The call to adventure is the single most important communication any leader will make.
- Select pathfinders first for passion, then for expertise.
- Prepare to overcome holdfasts who would frustrate your quest.
- Rely on experiments at every step of discovery. Never accept unverified discoveries.
- Give pathfinders the freedom to discover their passion, imagination and creativity.
- Keep your quest open and helpers will appear when you need them.
- Test for the big breakthrough by attempting to integrate previous discoveries and innovations
- Treat the quest as a race against time across uncharted territory.
- Skip the Mastery milestone at your peril. Application will be haphazard without mastery.
- Some will resist even the best ideas. Develop political constituency before attempting to spread the change.
- Quests transform pathfinders. Allow them to take a new place within the organization.
- Pursue relentless improvement during the ensuing stable period after the quest.
- Create a culture of ongoing quest.

## The Quest Effect

### Is Conventional Wisdom Wrong?

During the author's study of successful transformations, he concluded that most of what has been written about business transformation is essentially wrong. The accepted ideas, such as readiness for change, have some impact, but they fail to capture the epic sweep of organizational transformation.

Treating change as a quest is a superior predictor of successful transformation. Even though quests are highly effective the information on the nature of quests has not been available to organizational leaders, having been obscured by mythical metaphors and arcane language. Until now, the idea of the quest has not penetrated the organizational or corporate lexicon.

### The Quest Archetype

Dictionaries typically define quest as "an arduous search for something". However, the archetype of the quest is much more profound than the

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## About the Authors

**Randall Benson** is an author, speaker and business consultant. Since his first startup over 20 years ago, he has helped organizations achieve breakthrough performance. His work has been referenced in over 80 major media spots. He holds an M.B.A. from the University of Washington Foster School of Business.

**Margaret D. Smith** has co-authored and edited more than twenty books for clients. A poet, musician, and archivist, she is the author of six books on her own.

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definition. An archetype is a universal pattern that occurs in virtually all circumstances.

The quest archetype, first articulated by Joseph Campbell in 1945, is the universal pattern for the journey of transformation and renewal.

Benson has seen the quest play out in all types of organizations from manufacturing, to healthcare, to non-profit to government. The elemental pattern of the quest underpins virtually every organizational transformation. Typically leaders are unaware of the quest and it unfolds in a haphazard way. However, when leaders are aware of the quest archetype, and make their quest explicit, they can focus the power that drives transformation.

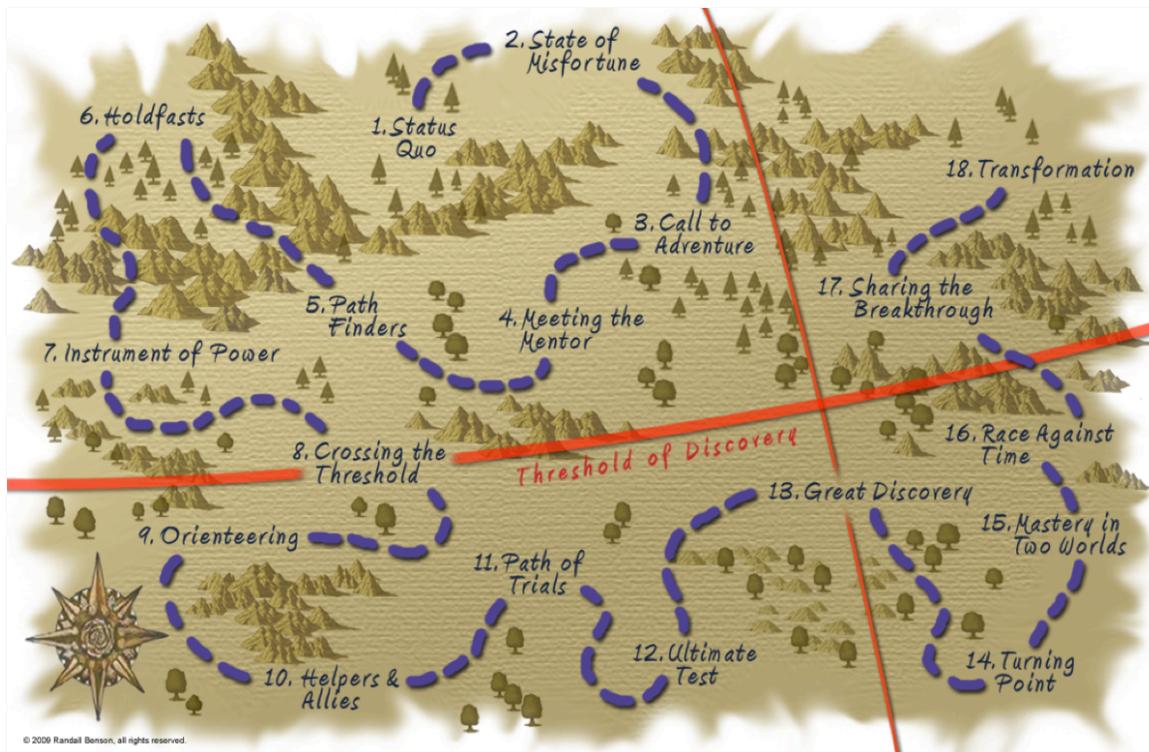
Benson intended *The Quest Effect* as a way to create awareness about the organizational quest and to help leaders tap its power for transformation. The book encourages leaders to purposely pattern their transformation or breakthrough initiatives on the quest archetype.

### The Quest Effect

The hallmarks of the quest effect include:

- A rapid increase in new capability
- Employee driven innovation
- Application of new concepts
- Discovery of significant breakthroughs
- A quantum leap in performance
- New vitality for the organization

These hallmarks are rarely achieved by conventional planning, proven-path approaches or programmatic change-management techniques. The author shares numerous examples of how modern organizations have used the quest to transform their organizations.



## The Quest Journey

At its heart, the quest is a journey, albeit a very special one. While each quest is unique, they all follow a fundamental pattern. The quest in an outbound journey, exploring possibilities and conducting experiments, until the breakthrough is achieved. After the breakthrough, it becomes a homeward journey with the prize, to ultimately renew the organization.

The quest journey has four phases:

1. Launch
2. Exploration (the outbound journey)
3. Breakthrough (the homeward journey)
4. Renewal

The quest carries pathfinder teams beyond home base, across the threshold of discovery, into uncharted territory and then returning back over the threshold

to renew home base. Every quest is a race against time across uncharted territory.

## Phase One: Launch

The Launch Phase, covering activities in the first quadrant of the map, addresses the organization's response to the initial threat or opportunity through the launch of the quest. The Launch must awaken the organization to the fact that something has irrevocably upset the status quo. In this phase the organization must wake up to the threat or opportunity, overcome reluctance and break away and organize to launch. It must "unfreeze" the organization, in Kurt Lewin's words, so that it can answer the Call to Adventure. If it falls short, the quest will fail to launch.

The Launch Phase has several milestones:

1. **Status Quo:** enjoying initial stability
2. **State of Misfortune:** awakening to the

dislocation, threat or opportunity

3. **Call to Adventure:** sounding the call to undertake a quest (and refusal to heed the call)
4. **Meeting the Mentor:** engaging the first guide
5. **Pathfinders:** organizing those who will embark on the quest
6. **Holdfasts:** breaking free from holdfast forces
7. **Instrument of Power:** acquiring essential tools that will help you succeed on your quest

The key pitfall in Phase One is the failure to launch. The magnetic draw of home base is powerful. Those who break away to pursue the quest must overcome a variety of obstacles. Those who succeed in launching the quest, in spite of the obstacles, put their organizations on the path to breakthrough.

Successful quests begin in the Launch phase and move into uncharted territory in the second phase.

## Phase Two: Exploration

The Exploration Phase encompasses the activities in the second quadrant of the map. In this phase the pathfinders have moved away from home base, cross the threshold of discovery and enter into uncharted territory. Uncharted territory refers to areas of exploration that are beyond the organization's working body of knowledge –uncharted territory is not known or agreed upon by the organization. Uncharted territory is rich with novelty, untested assumptions, innovation opportunities, and breakthrough ideas. It is also beset by obstacles, risks and barriers.

In this phase, the pathfinders are in a race against time to discover the prize—the breakthrough—that holds the power to renew the organization. They must challenge current assumptions, learn new principles, develop their capabilities, and follow their discoveries toward the big breakthrough. Exploration is marked by committing to change, discovering new ideas, testing possibilities, and preparing for the breakthrough.

The milestones in the Exploration Phase are

1. **Crossing the Threshold:** separation from the business-as-usual world of home base
2. **Orienteering:** assessing the new situation and gaining traction for the journey
3. **Helpers and Allies:** receiving often-unforeseen help from without
4. **Path of Trials:** experimenting, overcoming obstacles, making discoveries and dealing with setbacks
5. **Ultimate Test:** prevailing over a great crisis and surviving the ultimate test

Exploration demands experimentation. The experimental approach is the heart and soul of quest. Therefore, mastering the plan-do-check-act approach to organizational experimentation and discovery is essential to the successful quest.

The major risk in the Exploration Phase involves the misuse of time. If the pathfinders take too much time their discoveries will be too late to help the organization. Conversely, if they fail to devote enough time to build the capability necessary to achieve the prize, then they will fall short of the needed breakthrough. The pathfinders must hold the tension between the need to move quickly and the need to explore thoroughly.

Here pathfinders must forgo the security of the tried and true for the adventure of exploration and discovery. The hardships are real, but so are the thrill of discovery and the satisfaction of growth. In exchange for the hardship and effort pathfinders create opportunities for immense rewards.

When pathfinders use experimentation to create a spiral of evermore ambitious trials, they will eventually prepare themselves for the big breakthrough.

## Phase Three: Breakthrough

The Breakthrough Phase, in the third quadrant of the map, also takes place in uncharted territory. It begins with the achievement of the big breakthrough -- a new way of doing things. The breakthrough represents a turning point, wrapping up expansionary exploration and refocusing the group on mastering the breakthrough and returning with the prize to home base. After achieving the breakthrough, the pathfinders must integrate their discoveries and innovations, master every aspect of the breakthrough, and make it usable under the conditions of home base. The pathfinders will continue to face difficult challenges and setbacks as they prepare their return to home base.

The key milestones in the Breakthrough Phase include:

1. **The Great Discovery:** achieving and verifying the big breakthrough
2. **Turning Point:** determining the breakthrough is enough for renewal and starting the return journey
3. **Mastery in Two Worlds:** mastering the breakthrough under both experimental conditions and under the more robust requirements of everyday use
4. **Race Against Time:** returning to home base while renewal is still possible

This phase is sometimes referred to as the dangerous return. There is a tendency for the pathfinders to relax, knowing they have achieved a breakthrough and assuming the homeward journey will be trouble-free. Just as most mountain climbing accidents happen on the descent, pathfinders are easily caught off guard by the perils in the return phase.

The pathfinders must overcome challenges in making the breakthrough ready for everyday use. These include political resistance, technical problems, and resource requirements. During Breakthrough, pathfinders balance the tension between taking the time for mastery and the urgency of returning with the prize.

The Breakthrough Phase challenges pathfinders to:

- Recognize that the Exploratory Phase has ended
- Turn for home even though more could be explored
- Refine the breakthrough for everyday use
- Prepare for spread and adoption

## Phase Four: Renewal

The Renewal Phase covers the return of the pathfinders to home base and the benefit of the prize. Here the pathfinders act to share their breakthrough with the entire organization. They introduce the breakthrough and then trial the big change on a routine basis. Everyone works to perfect the change for use at home base. By spreading the breakthrough, the organization creates new vitality and renewal.

This phase may be a minor part of the quest if the original field experiments just need to be sustained. On the other hand, this phase can be challenging and complex if the organization needs to spread the breakthrough across many groups and make local adaptations. The key challenge is to pass the breakthrough from the custody of the pathfinders to the sustaining organization. This can pose organizational, technical, and cultural challenges. Not the least of the challenges is that the pathfinders will have to deal again with holdfast forces. When successful, the pathfinders will have successfully concluded their quest and can take their place within the new order that they helped build.

Major milestones of the Renewal phase include:

1. **Sharing the Breakthrough:** spreading the breakthrough throughout the organization
2. **Transformation:** enjoying a new level of organizational performance and taking advantage of new capabilities while pathfinders take their place in the new order

The Renewal phase concludes a cycle of the quest and takes the organization to a new level of functioning.

The organization is now poised for a period of relative stability and equilibrium. Yet, eventually there will be another awakening, a new call to adventure, and an opportunity to move the organization through the never-ending quest spiral. However, if the organization locks onto the new order and denies future quests, it will stagnate and decline. This is the fate of most organizations. But organizations that build the quest into their cultural DNA can extend their vitality indefinitely.

## Epilogue: The Never Ending Quest

Successful quests create new capability and new prosperity. Participants become influential and respected leaders. This change of state brings about a period of relative stability.

What was unexplored territory becomes part of an expanded home base. Expectations for what is possible become recalibrated. During these interludes of stability, organizations exploit breakthroughs and build new prosperity. However, during the plateau, organizations can easily downplay the need to quest and instead seek the path of safety when the next dislocation arrives. Do not let exploitation of past breakthroughs squeeze out new exploration. When exploitation trumps exploration and leaders chose safety over the quest, decline will inevitably result.

Quests become never-ending when each cycle of the quest leads to another, more ambitious quest; another journey of exploration an application. When organizations can create such a culture of continuing quest, they will assure industry leadership and long-term sustainability.

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