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## TECHNOLOGY OF SPIRAL DYNAMICS IN THE CONTEXT OF DETERMINING THE DETERMINANTS OF STRATEGIC DEVELOPMENT

### ABSTRACT

In modern economic conditions, enterprises function and develop as a complex organism. That provides the vital potential of each enterprise separately. The answer to this is the integration of psychological and managerial science. The potential for change of each enterprise causes not only the difference between organizations but also determines the success of their functioning and survival in the conditions of transformation. The successful functioning of the company also requires a solid foundation in material, financial and human resources, however, the peculiarities of the formation and development of the latter today are transformed the most. Simply diagnosing the statics of human resources actually gives nothing to manage. The category of formation of the leadership potential and transformation of motivational models of personnel in the conditions of pandemic, bifurcation, change of living conditions, transition to remote models, etc. is becoming more and more important. Over the past 20 years, business-leading systems in all developed countries have been transformed into practical, dynamic, and most effective techniques. One of the most popular and interesting is spiral dynamics. It is basically a very complex biopsychosocial model of development with a clear distribution system, but it is beautiful, comfortable and works well. Spiral dynamics is a theory developed by scientist Clare W. Graves. This is a kind of classification of the dominant types of thinking, both individual and social cultures of any scale: from family to conglomerate with hundreds of thousands of employees. According to the scientist and his followers, human thinking develops and transforms from one balanced state to another. Paradigms and value systems do not change chaotically, but according to prescribed rules. The development of each previous state is always the basis for the next. The question for business is not just how to diagnose the state of development level of the company's spiral dynamics, but to find the right indicators of the company's dynamics, which would clearly combine financial and economic success, innovation and technological development and socio-psychological models of the corporate culture.

The methodological basis of the study is a system of general scientific and special methods, which allowed to investigate the resistance of the state of the strategic potential to a certain level of spiral dynamics of development. The study was based on the use of the method of comparison, generalization - to clarify and formalize the essence of the concept, correlation and regression analysis - to build multi-factor regression models, calculate predictive values of integrated indicators of the leadership potential for each subsystem, optimize subsystems, determine the degree of influence of the leadership potential on the type of corporate culture; the graphic-analytical method - to provide clarity of the material and schematic representation of a number of theoretical and practical provisions of the study. Methods of computer processing, analysis and display of information using Microsoft Excel, STATISTICA were used for complex analysis. The information base includes official publications of international organizations, expert assessments of rating agencies, monographs, basic scientific developments of domestic and foreign authors, materials of scientific conferences, domestic and foreign publications, electronic resources of the Internet, etc.

**Keywords:** corporate culture, leadership potential, diagnostics of corporate culture

**JEL Classification:** M10, M12

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## INTRODUCTION

The formation of the post-industrial, information society and the creation of bifurcation conditions is making radical changes in the economic systems of countries, transforming economic relations at all levels. The main business entity - enterprises in a rapidly changing environment are undergoing the greatest transformations. Businesses are increasingly in need of the potential for change readiness, as well as a fundamentally new change management system. The complexity and multi-vector influence of external factors necessitate the formation of a management system that would be ready not only to anticipate new trends but also to respond to them, modernizing approaches to managing all internal processes of the enterprise. In the current situation, it is objectively necessary to understand change as a stimulus to sustainable development (both in times of crisis and under favorable circumstances), which becomes the most important prerequisite for achieving future strategic priorities for the company. The fact is that some companies are trying to break into the market leaders at once, while forgetting about their potential, which will give them the strength to achieve this. And some companies are moving towards the goal - to become market leaders gradually, evolutionarily, making changes not in one day, but over the years, along the evolutionary path of development.

Unfortunately, being in conditions of not only a crisis in the country but also deep stagnation, in a severe psychological crisis, life makes us cautious, depriving us of lightness and recklessness in these conditions. We lose confidence and immediacy, trying to calculate everything in advance, and when we fail, we are very sorry for the lost and unrealized opportunities. And we actually have two of them: in fact, to take a step forward, to step into the darkness, to decide and move; or stay still where we are, not hoping to get anything, not risking anything, and receiving nothing in the end. Just as a person has a chance to change something in his life, so, a company always has a chance - to stay in the conditions in which it exists today, or to take a sure or unsure step forward in order to change something in its activities.

As a rule, for those who can lose nothing, or for those who have lost everything it is easier to take this step forward. The fact is that everyday life is so programmed that sometimes it becomes scary to change something, because it destroys the whole established system, and we will have to adapt to the new realities of existence. Integration of scientific thought and comprehensive understanding of all processes taking place in the management of economic entities today is the main direction of research, which is solved through the application of the basic provisions of the spiral model of the evolutionary system of human values of psychologist C. Graves [16] and his followers D. Beck and C. Cowan [4], who built a whole new direction in sociopsychology.

## LITERATURE REVIEW

One of the most important trends in modern management methodology is the interaction and interpenetration of different models of strategic activities as a means of systems development. The thesis about the spiral development of the material world is a reflection of the dialectical approach and it keeps its significance till nowadays. This metaphorical image, combined with ideas about the ascending nature of development, led scientists to a conceptual model of system development in the form of a spiral that «expands upward». The image of the spiral of development emerged as a dialectical negation and synthesis of two metaphysical images of the process of development - the image of translational motion in a straight line and the image of motion in a closed circle. Spirality is a characteristic of the state of an elementary particle. It is the projection of the spin of the particle in the direction of motion [14]. Becoming a classic, the spiral model is used by economists, publicists, statesmen, and experts. In the second half of the last century, the eminent psychologist C. Graves [16], having processed a huge amount of experimental and statistical data, created a spiral model of the evolution of the human value system. His works were developed by D. Beck and C. Cowan [4], who built on their basis a whole new direction in sociopsychology, which they called «spiral dynamics». Since the late 90's of the last centuries, spiral dynamics has been successfully used to: accurately determine the motivation of human activity, leadership development, conflict resolution and effective change management in organizations [5, 6, 8]. Thus, spiral dynamics has a powerful arsenal of methods and tools for diagnosing and solving problems both in the company and in the individual, as it has a truly universal approach to motivating human actions. Today, the spiral dynamics is of great interest among scientists and experts, who consider it a convenient tool for analyzing and solving many practical problems related to management in organizations.

## AIMS AND OBJECTIVES

The aim of the study is to highlight the results of research on the diagnosis of the potential for change in accordance with the level of spiral dynamics of its components.

## METHODS

The methodological basis of the study is a system of general scientific and special methods, which allowed to investigate the resistance of the state of the strategic potential to a certain level of spiral dynamics of development. The study was based on the use of the method of comparison, generalization - to clarify and formalize the essence of the concept, correlation and regression analysis - to build multi-factor regression models, calculate predictive values of integrated indicators of the leadership potential for each subsystem, optimize subsystems, determine the degree of influence of the leadership potential on the type of corporate culture; the graphic-analytical method - to provide clarity of the material and schematic representation of a number of theoretical and practical provisions of the study. Methods of computer processing, analysis and display of information using Microsoft Excel, STATISTICA were used for complex analysis. The information base includes official publications of international organizations, expert assessments of rating agencies, monographs, basic scientific developments of domestic and foreign authors, materials of scientific conferences, domestic and foreign publications, electronic resources on the Internet, etc.

## RESULTS

In the second half of the XX century, the American psychologist Clare Graves and his followers Chris Cowan, Don Beck and Ken Wilber introduced a new socio-evolutionary theory to the world. The theory of spiral dynamics describes certain stages of development of man and society. The main postulates of the theory are based on the fact that all his life a person develops in a spiral. The person moves upwards, accumulating the experience gained in previous spirals. Under certain conditions, people can awaken the previous ones and activate them. Since the developers of Spiral Dynamics are psychologists, the description of the tools is based on psychological terms. Thus, the dynamic spiral is presented as a model on which certain v-Memes (value Memes) are strung. With the help of v-Memes, the authors explain the value systems that exist in different people and are integrated into the systems of corporate cultures of different organizations. Each level of the spiral is characterized by its bright colors. Researchers have summarized 8 main characteristics of researchers identified by researchers, around which experience and ideas are accumulated (Table 1).

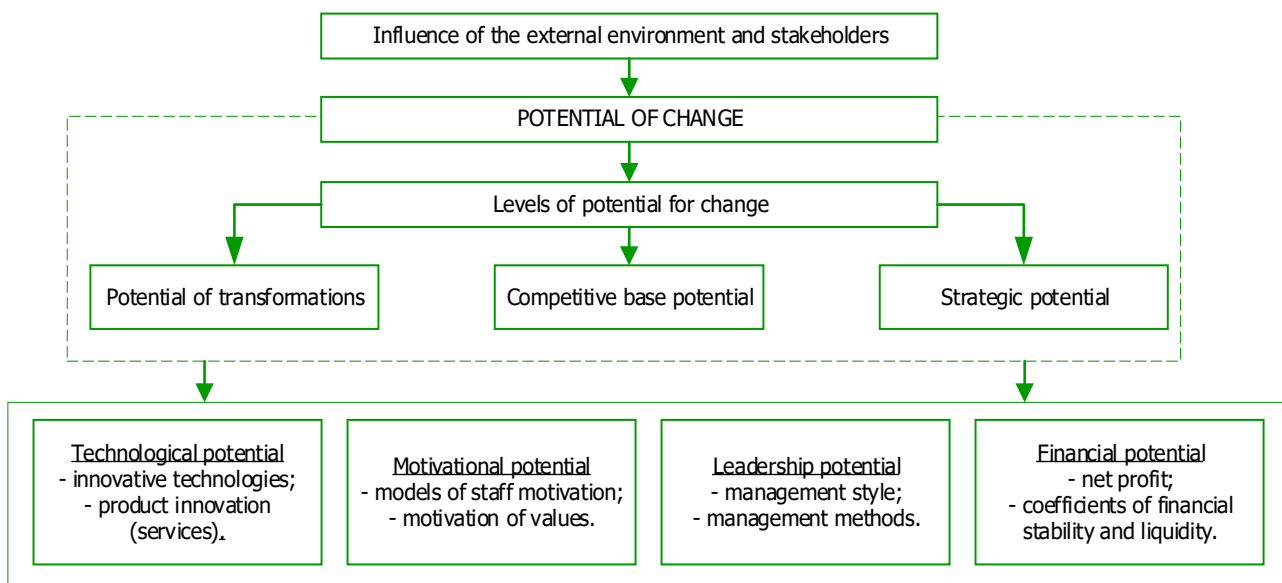
**Table 1. Brief description of v-Memes by E. Beck, C. Cowan [4].**

Valuable Mem	The accepted name	The main motives
Beige	survival	Ability to ensure survival through the use of innate qualities
Purple	family ties	Blood ties and mysticism in a magical world that scares
Red	power forces	Imposing power on oneself, on people and nature through breakthrough independence
Blue	the power of nature	Imposing an absolute belief in the only right path and obedience to authority
Orange	rivalry	Thinking of finding new opportunities to improve results
Green	interpersonal relationships	Human well-being and adherence to consensus are a top priority
Yellow	flexible flow	Flexible adaptation to change through a vision of large-scale images
Turquoise	global thinking	Attention to the dynamics of the entire planet Earth and actions at the macro level

The study of spiral dynamics allows us to conclude that this is a theory that explains the patterns of formation of human values. It has many practical applications, but what has the value of theory for management - is the laws of development of organizations. The experience of practitioners of spiral dynamics proves that the experience and understanding of the laws of spiral dynamics allow you to effectively manage change, realize failures in implementing innovations, and determine the conditions for transition to a new level of development. The model of spiral dynamics determines the values and logic of their development, not just leadership styles or management types. Critics of the model point out that the concept is elitist in nature, and argue that the transfer of the tools of genetics and evolutionary biology is still not properly justified. In spiral dynamics, there are interesting conclusions of Don Edward Beck, Christopher C. Cowan on the success of change strategy depending on the correctness of diagnosing the level of spiral dynamics of the organization in general and management in particular. One of the natural principles of such diagnostics is called: the assessment of the potential for change. Graves himself, who conducted experiments on both business structures and clinical trials, concluded that the potential for change, based on the psychological characteristics of man, can be in a state that corresponds to any point

on the line from open to arrested and to closed (OAC). The conducted research allows the author to interpret these states in relation to the potential for change in organizations. Thus, the state «open» is a characteristic of the state of potential, when the organization can move, both in the direction of transformation to development and in the direction of degradation changes. The state «arrested» is a characteristic of the organization's movement towards degrading change. And the state «closed» is the organization being in a certain dynamic equilibrium without introducing any changes. Based on the study of different types of potential [1, 2, 3, 7, 13] and approaches that exist in domestic and foreign literature, from the author's point of view (based on Fig. 1) there should be identified objects of the studied potential for change in relation to the three states described above: the strategic potential - as the level of potential that ensures the transition of the organization to a higher level; the basic competitive potential - the potential of a certain dynamic balance of the organization; the potential of transformations – the potential of transition to a lower level of development.

Let's focus on the essential brief characteristics of each type of potential because these types form the competitive and strategic potential of the enterprise, and the potential for change is a «cross-cutting core» for the development of the whole enterprise. The author summarized all the approaches to the formation of the enterprise potential and gave the author's general scheme of enterprise potential formation in Fig.1.



**Figure 1. Change potential model.**

The system-forming elements of the potential for change are technological potential (as a characteristic of the level of technology used by the organization), leadership potential (integral potential of quality not only of management but of the entire staff of the organization), motivational potential (system of motivation models used in the organization), financial potential (element of resource provision of the organization and opportunities for freedom of action in the transition to new levels).

The study of spiral dynamics and the practice of forming the potential for change made it possible to formalize the relationship between the level of potential and the levels of dynamic development.

The concept of potential naturally and absolutely adequately occupied an important place in the categorical apparatus of economic theory. This was primarily due to radical changes in the strategic priorities of global organizations, including a change in the philosophy of entrepreneurship: instead of «making a profit today» - «building capacity today», which guarantees «making a profit tomorrow». This philosophy of entrepreneurship is almost the only possible way to ensure stable economic growth in a rapidly changing market environment.

The vital activity and development of the corresponding multicomponent economic system are largely determined by the availability and use of the country's own potential and its industrial enterprises (Table 2).

**Table 2. Relationship between levels of spiral development and characteristics of the potential for changes in the enterprise.**

Levels of spiral development, types of culture and main v-Memes	Elements of the potential for change
Beige (Culture of Survival): «Everything must be done to survive». Natural instincts, automatisms, reflexes	TP- the level of industrial development of society, energy and resource dependence, environmentally hazardous technologies; LP - low level; MP - models of negative influences are used; FP - dependence on external sources of funding, actions in terms of saving financial resources.
Purple (Culture of belonging): «Because it is a rule in our country», faith, traditions, rituals	TP- the level of industrial development of society, energy and resource dependence, environmentally hazardous technologies; MP- great affiliation of existing experience, the organization depends on government regulations on the model of motivation.; LP - low level, dependence on national traditions; FP - dependence on external sources of funding, actions in terms of saving financial resources.
Red (Culture of Power): «Because I said so», Power, dominance of the situation	TP - the level of industrial development of society, energy and resource dependence, environmentally hazardous technologies; LP - one dominant leader; MP - dominance of negative influences over positive ones; FP - dependence on external sources of funding, operates in terms of saving financial resources.
Blue (Culture of rules): «Because it is a rule», authority, laws, norms	TP - level of post-industrial development of society, energy-saving technologies under implementation, environmentally friendly technologies; LP - dominant leader, focused on regulations and laws; MP - dominance of positive influences over positive ones, but the use of negative influences, rewards are clearly regulated; FP - financial resources are not enough for new projects, but everything is justified by regulations, the organization operates within the law, is open to cooperation.
Orange (Culture of Result): «Because it brings results», ambition, opportunity, competition and pragmatism	TP - all elements of information economy, energy and resource-saving technologies, environmental strategies; LP - entrepreneurial leadership, a profit-oriented leader; MP - dominance of positive influences over negative ones, research of internal motives and values of employees; FP - many sources of funding for new projects, financial resources are a priority, but not key.
Green (Culture of agreements): «Because we agreed», cooperation, collegiality, common interests	TP - all elements of the information economy, energy and resource-saving technologies, environmental strategies; LP - collegial leadership; MP - dominance of positive influences over negative ones, research of internal motives and values of employees; FP - many sources of funding for new projects, financial resources are a priority, but not key.
Yellow (Culture of Creativity): «Because this is our development», innovation, self-realization, freedom, flexibility	TP - all elements of the information economy, energy and resource-saving technologies, environmental strategies; LP - collegial leadership; MP - constant research of internal motives of employees and formation of motivation on the basis of these motives; FP - many sources of funding for new projects, financial resources are not key.
Turquoise (Culture of Synthesis): «Because together we make a breakthrough into the future», self-government, unity and vocation	TP - technologies of the future, environmental friendliness of technology is a priority; LP - mass leadership; MP - motivational models based on individual values; FP - financing of innovative projects.

The study of the potential for change in Ukraine was chosen as the object of study by Ukrainian companies, which in recent years were ranked among the top successful companies as innovative [15], as the best employers [12], successful in activities and profits [10]. A fragment of the results of expert processing of company ratings by components of the potential for change is presented in Table 3.

**Table 3. Results of ranking companies by levels of potential for change.**

The company name	Branch	The level of potential for change in terms of potential components			
		TP	MP	LP	FP
Metinvest	metallurgy	8	4	6	10
ATB	retail	6	4	6	9
Kernel	agro-industrial complex	9	4	7	8
Fozzy Group	retail	4	3	7	7
DTEK Energy	fuel and energy complex	5	2	3	7
ArcelorMittal Krivoy Rog	metallurgy	5	3	3	6
MBP	agro-industrial complex	7	3	3	5
TEDIS Ukraine	retail	1	2	2	3
Zaporizhstal	metallurgy	3	2	2	3
Epicenter K	retail	3	3	3	4
Roshen	food industry	5	4	6	5
Ferrexpo	metallurgy	4	3	5	6
BaDM	pharmacy	3	2	3	7
Optima-Pharm	pharmacy	3	2	3	7
Ukrnafta	fuel and energy complex	3	2	2	6
Kyivstar	telecommunications	6	3	4	6
Nibulon	transport, agro-industrial complex	3	2	3	4
WOG	fuel and energy complex	4	4	4	5

At the same time, 10 corresponds to the largest manifestation of the green and yellow level of spiral development, 1 - brings closer the characteristics of the potential of companies to the purple level.

Each company, which is one of the thousand largest companies in Ukraine, generates a net income of over UAH 1 billion per year - most of these companies are industries that are characterized by raw materials and low added value.

This is evidenced by the results of a study by financial analyst Roman Kornilyuk and R&D-center YouControl - «TOP 1000 largest companies in Ukraine in terms of revenue in 2020» [9]. The leaders in revenue growth are companies in the following sectors: electricity, retail, construction and pharmaceuticals [9].

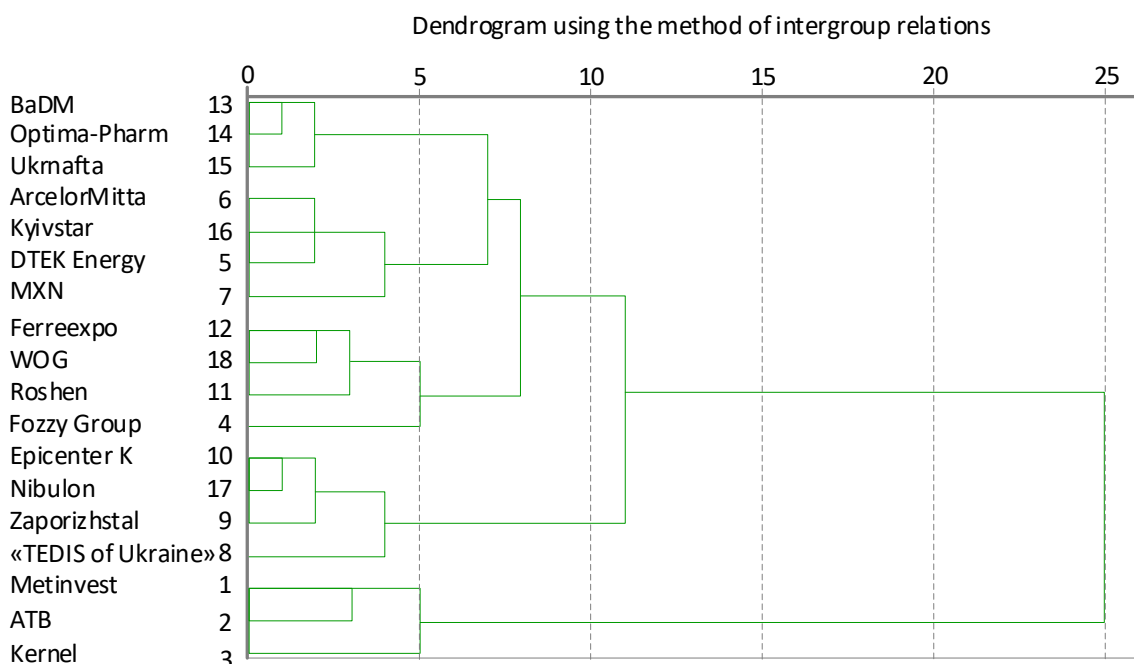
The choice of methodological research tools allowed us to make a conclusion about the use of cluster analysis to understand the dynamics of the largest companies in Ukraine. Therefore, the study proposes to use elements of cluster analysis to study the relevance of the level of development of Ukrainian companies in relation to spiral dynamics. Business entities are structured according to similar systemic properties and level of development. To improve the organizational and economic scheme of interaction of the elements of potential, there was used statistical and dynamic analysis of the reasons for the increase in the gap in the economic development of the studied subjects. As a result of the study, it was found that it is appropriate to single out the study on the following elements of the potential of enterprises: technological potential, leadership potential, motivational potential, financial potential. The key result of the study is the structuring of the potential toward the dominance of the elements of the study of human resources in the organization. On the one hand, it is the level of leadership potential in human resources and leadership strategies used by company management. On the other hand, these are systems of motivation, as system-forming factors in the formation of quality human resources. It is these key potentials that are relevant to the characteristics of the levels of spiral dynamics.

Regarding the processing of statistical materials, it should be noted that these samples were not standardized, as the assessment of the elements of the potential of economic entities was carried out by the method of expert evaluation. That means all indicators have a value in points. Based on the fact that the sample is not large, it is recommended to choose a hierarchical clustering method. But this method has certain features (the resulting clusters are grouped into chains), which makes it impossible to determine the specific number of objects in the cluster. Since the number of clusters is determined by the level of development - «high», «medium» and «low», we check the accuracy of calculations by k-average (Table 4).

**Table 4. Clustering results.**

Cluster number and characteristics	The number of elements and the composition of the cluster by the hierarchical method	The number of elements and the composition of the cluster by the method of k-means
1 (Companies operate in the orange-green dynamics of development)	3 («Metinvest», ATB, Kernel)	4 («Metinvest», ATB, Kernel, Fozzy Group)
2 (Companies operate in orange-blue dynamics)	11 (Fozzy Group, DTEK Energy, «ArcelorMitta», MHP, Roshen, Ferrexpo, BaDM, Optima-Pharm, Ukrnafta, Kyivstar, WOG)	9 (DTEK Energy, «ArcelorMitta», MBP, Roshen, Ferrexpo, BaDM, Optima-Pharm, Kyivsta, WOG)
3 (Companies operate in conditions of red and blue dynamics)	4 (Nibulon, «TEDIS Ukraine», «Zaporizhstal», «Epicenter K»)	5 (Ukrnafta, Nibulon, «TEDIS Ukraine», «Zaporizhstal», «Epicenter K»)

Clusters constructed by the hierarchical method and the k-average method have approximately the same composition. This can be seen on the dendrogram (Fig. 2).



**Figure 2. Dendrogram by hierarchical clustering method.**

Except for Ukrnafta and Fozzy Group, which are in the transition zone.

## CONCLUSIONS

Thus, the study of the dominant elements of the potential of the enterprise makes it possible to determine the directions of development of organizations. With the help of Spiral dynamics, we can determine the existing level and determine the further vector of movement.

In a constantly changing world and conditions of competition for each organization, it is especially important to expand their own capabilities and tools to achieve goals.

The main thing is not to stop at the achieved level and continue to look for opportunities to move to a new stage in development. The theory of spiral dynamics can be used as a practical tool for creating highly efficient organizations, building long-term plans in conditions of instability, to obtain new ideas and meaning of activity. It is possible to apply knowledge of the theory in various areas that will allow solving any problems with great success. Knowledge of the stages of development of the organization acquires special relevance in conditions of rapidly growing competition and the resulting need for rapid response and development of the principles of functioning.

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## **ТЕХНОЛОГІЯ СПІРАЛЬНОЇ ДИНАМІКИ В КОНТЕКСТІ ВИЗНАЧЕННЯ ДЕТЕРМІНАНТІВ СТРАТЕГІЧНОГО РОЗВИТКУ**

У сучасних економічних умовах підприємства функціонують і розвиваються як складний організм. Що забезпечує життєвий потенціал кожного підприємства окремо? Відповідь на це дає інтеграція психологічної та управлінської науки. Потенціал змін кожного підприємства зумовлює не тільки відмінність між організаціями, а й визначає успіх їхнього функціонування та виживання в умовах трансформацій. Успішна діяльність підприємства також вимагає міцного підґрунтя в матеріальних, фінансових і людських ресурсах, проте особливості формування й розвитку останніх сьогодні трансформуються найбільше. Просто діагностика статичності людських ресурсів фактично нічого не дає для управління. Усе більшого значення набуває категорія формування лідерського потенціалу та трансформація мотиваційних моделей персоналу в умовах пандемії, біфуркації, зміни умов життя, переходу до дистанційних моделей тощо. За останні 20 років системи ведення бізнесу в усіх розвинених країнах трансформувалися в практичні, динамічні й максимально ефективні методики. Одна з найбільш запитуваних і цікавих – спіральна динаміка. В основі це дуже складна біопсихосоціальна модель розвитку з чіткою системою розподілу, але вона красива, зручна та добре працює. Спіральна динаміка – це теорія, розроблена вченим Клером Грейвзом. Це своєрідна класифікація домінуючих типів мислення і окремої особистості, і соціальної культури будь-якого масштабу: від сім'ї до конгломерату з сотнею тисяч співробітників. На думку вченого та його послідовників, мислення людини розвивається й трансформується з одного збалансованого стану в інший. Парадигми та системи цінностей змінюються не хаотично, а відповідно до прописаних правил. Розвиток кожного попереднього стану – завжди основа для наступного. Перед бізнесом постає питання, як не просто діагностувати стан рівня розвитку спіральної динаміки компанії, а знайти правильні показники-індикатори динаміки компанії, які б чітко поєднували між собою фінансово-економічний успіх, інноваційно-технологічний розвиток і соціально-психологічні моделі корпоративної культури.

Методологічною основою дослідження є система загальнонаукових та спеціальних методів, що дозволило дослідити резистентність стану стратегічного потенціалу на певний рівень спіральної динаміки розвитку. Проведене дослідження базувалося на використанні методів: порівняння, узагальнення – для уточнення та формалізації сутності поняття; кореляційно-регресійного аналізу – для побудови багатофакторних регресійних моделей, розрахунку прогнозних значень інтегральних показників лідерського потенціалу в кожній підсистемі, оптимізації підсистем, визначення ступеня впливу лідерського потенціалу на тип корпоративної культури; графоаналітичного методу – для надання наочності матеріалові та схематичності зображення низки теоретичних і практичних положень дослідження. Для проведення комплексного аналізу застосовувалися методи комп'ютерного оброблення, аналізу та відображення інформації за допомогою програм Microsoft Excel, STATISTICA. Інформаційною базою є офіційні публікації міжнародних організацій, експертні оцінки рейтингових агентств, монографічна література, фундаментальні наукові розробки вітчизняних та зарубіжних авторів, матеріали наукових конференцій, вітчизняні й зарубіжні публікації, електронні ресурси мережі Інтернет тощо.

**Ключові слова:** корпоративна культура, лідерський потенціал, діагностика корпоративної культури

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