The lernOS Guide

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Getting Started

We live and work in a world of constant change. With trends like globalization, digitization, and urbanization the so called VUCA world emerged. VUCA[1] stands for volatility, uncertainty, complexity, and ambiguity as described in a study by James A. Lawrence in 1991. In such an environment theories, principles, and tools for management and self-management from the 20th century have to be updated for the digital connected knowledge society of the 21st century. In his book Drive[2] Daniel Pink outlined that change in 140 characters: "Carrots & Sticks are so last century. We need to upgrade to autonomy, mastery and purpose".

This is true for individuals and organizations (for-profit and non-profit). To be successful in a VUCA world you have to practice a workstyle of "self-directed lifelong learning". You have to acquire new (digital) skills and also get used to new (digital) tools. To be successful as an organization you have to become a "learning organization". A learning organization according to David Garvin[3] is an organization skilled at creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights.

In terms of learning not all knowledge has to be created from scratch, not every wheel has to be reinvented and not all mistakes have to be repeated. If you have an open mindset an connect with others

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[1]https://en.wikipedia.org/wiki/Volatility,_uncertainty,_complexity_and_ambiguity
[2]https://en.wikipedia.org/wiki/Drive:_The_Surprising_Truth_About_What_Motivates_Us
[3]https://hbr.org/2008/03/is-yours-a-learning-organization

inside and outside your organization you will be standing on the shoulders of giants[4]. Consultancy McKinsey found[5] that a fully networked enterprise in contrast to companies working in silos internally and externally has a benefit of over 30%. So working in an open and connected way seems to be good for you and your organization at the same time.

The digital transformation[6] enables new ways of working and new ways of learning. Digital transformation means that products, processes, and business models are digitized (e.g. transition vinyl record/compact disc/spotify, Airbnb as hotel company without buildings, Uber as taxi company without cars). To make use of this new possibilities digital skills have to be acquired by everybody. These skills can be learned with new methods like Getting Things Done[7], Personal Knowledge Mastery[8] Scrum[9], Holacracy[10], and Working Out Loud[11]. One example: at the german engineering company Bosch 98% of employees practicing Working Out Loud say that the method helps to improve digital skills and support cultural change. You don't have to be a digital native to learn these skills. Everybody can learn them one small stepp at a time.

lernOS will help you and your organization to develop necessary 21st century skills[12] like problem-solving, communication, creativity, and collaboration. You can use lernOS on your own or together with 3-4 other people in a peer support[13] group called lernOS Circle.

What is lernOS?

lernOS is an operating system (OS) for livelong learning and learning organizations. The name is derived from the Esperanto verb "to learn". Like OKR lernOS can be used on different levels:

- **Personal (lernOS mi, "I will learn"):** use it as a personal knowledge management and productivity tool for yourself
- **Team (lernos ni, "We will learn"):** use it as a tool for communication and collaboration on team level
- **Organization (lernos ni, "We will learn"):** use it as an agile management system for your whole organization

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[4]https://en.wikipedia.org/wiki/Standing_on_the_shoulders_of_giants
[5]https://www.mckinsey.com/industries/high-tech/our-insights/the-rise-of-the-networked-enterprise-web-20-finds-its-payday
[6]https://en.wikipedia.org/wiki/Digital_transformation
[7]https://gettingthingsdone.com/
[8]https://jarche.com/pkm/
[9]https://www.scrumguides.org/
[10]https://www.holacracy.org/constitution
[11]https://workingoutloud.com/
[12]https://learning.mozilla.org/en-US/web-literacy
[13]https://en.wikipedia.org/wiki/Peer_support

This guide describes the implementation of lernOS on the personal level. The basic elements of lernOS are:

- **Objectives & Key Results:** what you try to reach and how you measure success
- **Activities:** tasks and **roles** you have, **projects** you run
- **Knowledge:** your **expertise**, know-how between your ears or codified in **knowledge assets** (e.g. checklists, presentations) stored in your **repositories** (e.g. social intranet, onedrive, slideshare)
- **Relationships:** people in your **social network** (physical of virtual) helping you to achieve your objectives

The **lernOS Canvas** (PDF[14]) uses a similar structure as the business modell canvas[15] by Alex Oster-walder. It can be used to systematically go through the elements of lernOS and create your personal management system with a strong focus on knowledge and learning.

Figure 1: The lernOS(mi) Canvas

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[14]lernOS-mi-Canvas.pdf
[15]https://en.wikipedia.org/wiki/Business_Model_Canvas

lernOS Sprint - Driving Agile Planning And Execution

A lernOS sprint consists of 13 weeks (week 0 -12). In week 0 all organizational issues meetings, communication channels, documentation etc.) and a first version of your objective(s) for the sprint are defined. The objective(s) for the sprint can be refined between week 0 and week 1. In week 1 the objective(s) are fixed for the sprint.

In week 1-12 there is a weekly 30-60-minut event called the lernOS Check-In. The Check-In is a short ceremony to track results. Every Check-In has the same agenda structur (see also The Beginners Guide to OKR[16], page 38):

1. **Warm-up:** what happend since the last check-in?
2. **Objective Progress:** what changed in the Key Results since the last Check-In?
3. **Confidence Level:** with the information I have today, how confident am I that I will reach earch Key Result?
4. **Impediments:** what is slowing me down?
5. **Initiatives:** what am I going to do to improve results?

lernOS Circle - From Talking The Talk to Walking the Walk

Of course you can practice lernOS on your own. But it is more fun and also easier if you practice it in a group of 4-5 people called a lernOS Circle. A Circle is a peer support[17] group where people help each other by providing knowledge, experience, emotional, social and practical help. The lernOS Circle is a "circle of trust" so what happens in the Circle stays in the Circle.

In a lernOS Circle every Circle member chooses one or more individual objectives. For each objective key results are definied that measure on a scale from 0.0 to 1.0 if the objective is reach. The objectives should be ambitious so that a key result completion rate of 0.7 is considered a success.

The lernOS Circle meets each week in a 30-60 minutes Check-In with the agenda described above. The Check-in can be face-to-face or virtual. If Circle members don't know each other it might be good to have the first Check-In's face-to-face to get to know each others and build trust.

Tools that might help to organize communication and documentation for Circles:

- **Web Conferencing** like Skype for Business[18], Skype[19], Zoom[20], GoToMeeting[21], Circuit[22]

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[16] http://felipecastro.com/resource/The-Beginners-Guide-to-OKR.pdf
[17] https://en.wikipedia.org/wiki/Peer_support
[18] https://en.wikipedia.org/wiki/Skype_for_Business
[19] https://en.wikipedia.org/wiki/Skype
[20] https://en.wikipedia.org/wiki/Zoom_Video_Communications
[21] https://en.wikipedia.org/wiki/GoToMeeting
[22] https://circuit.com

- **Instant Messengers** like Threema[23], Microsoft Teams[24], Slack[25], WhatsApp[26], WeChat[27], Telegram[28], Signal[29], RocketChat[30]
- **Enterprise Social Networks** like Jive[31], Yammer[32], Connections[33], Lithium[34], Workplace by Facebook[35]
- **Personal Notebooks** like OneNote[36], Evernote[37], TiddlyWiki[38], Etherpad[39]
- **File Hosting Services** like Dropbox[40], OneDrive[41], Google Drive[42], OwnCloud[43]
- **Task Management Services** like Trello[44], Microsoft ToDo[45], Microsoft Planner[46]
- **Mind Mapping Software** like XMind[47], Freemind[48],a MindManager[49], iThoughts[50], MindMeister[51]
- **Weblog Software** like Wordpress[52], Tumblr[53]

lernOS Memex - Get Things Out Of Your Head & In A System You Trust

Everything you define or agree upon should be documented in a system you trust. This is not for bureaucracy reasons but to keep your head free for creative knowledge work. You can use any personal notebook (paper-based or digital) as lernOS Memex.

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[23] https://en.wikipedia.org/wiki/Threema
[24] https://en.wikipedia.org/wiki/Microsoft_Teams
[25] https://en.wikipedia.org/wiki/Slack_(software)
[26] https://en.wikipedia.org/wiki/WhatsApp
[27] https://en.wikipedia.org/wiki/WeChat
[28] https://en.wikipedia.org/wiki/Telegram_(service)
[29] https://en.wikipedia.org/wiki/Signal_(software)
[30] https://rocket.chat
[31] https://en.wikipedia.org/wiki/Jive_Software
[32] https://en.wikipedia.org/wiki/Yammer
[33] https://en.wikipedia.org/wiki/IBM_Connections
[34] https://en.wikipedia.org/wiki/Lithium_Technologies
[35] https://en.wikipedia.org/wiki/Workplace_by_Facebook
[36] https://en.wikipedia.org/wiki/Microsoft_OneNote
[37] https://en.wikipedia.org/wiki/Evernote
[38] https://en.wikipedia.org/wiki/TiddlyWiki
[39] https://en.wikipedia.org/wiki/Etherpad
[40] https://en.wikipedia.org/wiki/Dropbox_(service)
[41] https://en.wikipedia.org/wiki/OneDrive
[42] https://en.wikipedia.org/wiki/Google_Drive
[43] https://en.wikipedia.org/wiki/OwnCloud
[44] https://en.wikipedia.org/wiki/Trello
[45] https://en.wikipedia.org/wiki/Microsoft_To-Do
[46] https://en.wikipedia.org/wiki/Microsoft_Planner
[47] https://en.wikipedia.org/wiki/XMind
[48] https://en.wikipedia.org/wiki/FreeMind
[49] https://en.wikipedia.org/wiki/MindManager
[50] https://www.toketaware.com/ithoughts-ios
[51] https://en.wikipedia.org/wiki/MindMeister
[52] https://en.wikipedia.org/wiki/WordPress
[53] https://en.wikipedia.org/wiki/Tumblr

If you do not have any tool at hand, you can download and use the Tiddlywiki-Version of lernOS Memex[54] which is structured by the basic lernOS elements by default. This version is based on TiddlyWiki[55], a personal wiki that lives in a single HTML file:
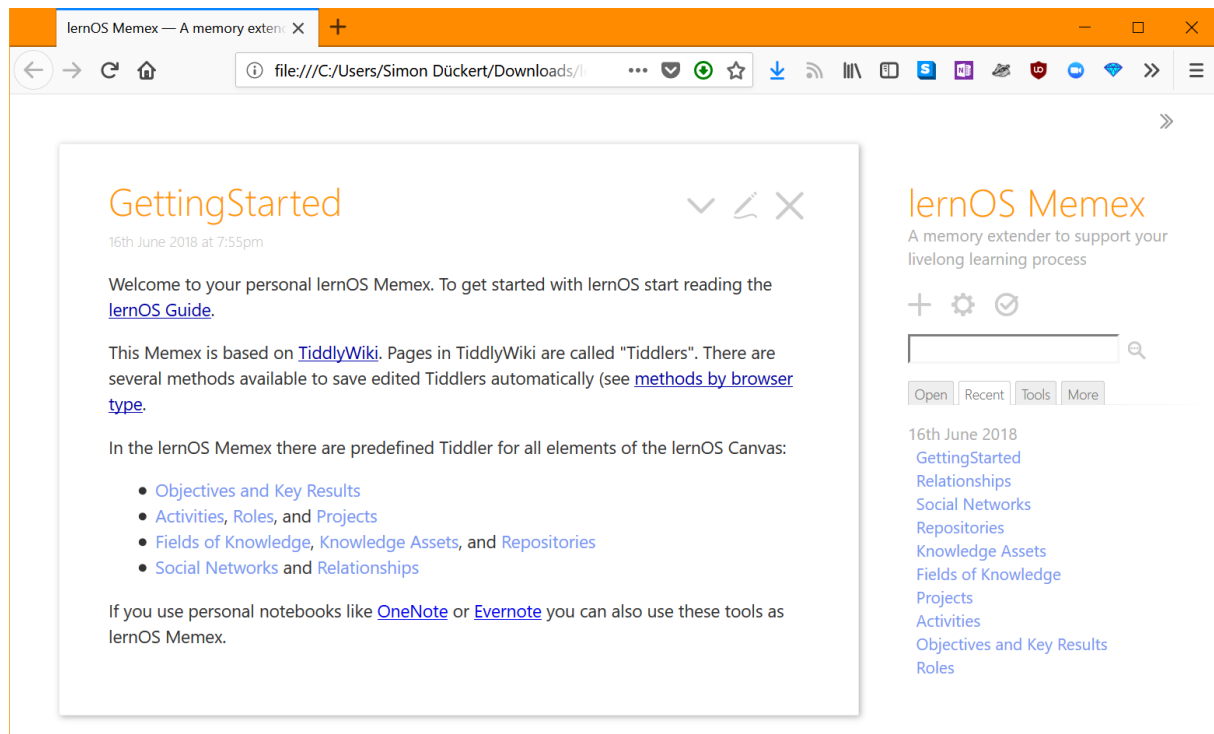

Figure 2: The lernOS(mi) Canvas