The Open Organization Workbook

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Bryan Behrenshausen

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Bryan Behrenshausen works for Red Hat on Opensource.com, where he's been a writer and editor since 2011. In 2016, he earned his PhD in Communication from The University of North Carolina at Chapel Hill, where he studied the relationship between culture, technology, and other complicated words.

Introduction

Jim Whitehurst

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Getting Started

Enacting change management at scale

Jen Kelchner and Sam Knuth

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Getting started with the exercises in this book

Laura Hilliger

The exercises we've collected in this book apply co-design and participatory methodologies. "Participatory" means that an exercise invites input from participants. Rather than "presenting" information, the facilitator involves participants in the educational experience to help define and solve problems, putting the power of learning in their hands. The exercises in this book aim to be:

- **Participatory:** They engage and activate participants from the beginning, getting them moving and interacting (rather than listening and watching).
- **Purposeful:** They help participants work toward the goal of becoming more open and understanding, so our organizations can create meaningful change.
- **Productive:** They strive to be well-planned, so that participating produces concrete outcomes in the allotted time (and participants feel that time was well spent).

These methods will help you collaborate, teach, learn, and explore the five characteristics of open organizations—which are the five themes guiding this book.

Each unit concludes with a series of exercises. Exercises are of three basic types:

- "Introductions," designed to introduce the underlying concepts
- "Reflections," designed to help participants think more deeply about those concepts
- "Actions," designed to offer simple but effective ways you can begin making change in your organization

At the beginning of each exercise, you'll find a breakout box outlining how long the exercise might take, as well as the materials required. As reflection is an important part of learning, most exercises also conclude with instructions for guiding thoughtful reflection on their outcomes.

On facilitation

Facilitating learning with a group of people is an art. A monotone, disinterested, mentally dissociated facilitator may have a clear, concise, well crafted lesson plan, but still fail to accomplish learning objectives. Likewise, an enthusiastic and sporadic social butterfly may let loose a random stream of consciousness but change perceptions and inspire real growth and learning.

Your best bet is to assemble a team of co-facilitators who can help you shape and run the agenda. We recommend a ratio of at least one facilitator for every 20 participants.

Although our exercises address serious topics, we nevertheless encourage you not to underestimate the value of having fun when facilitating. The exercises in this book provide tips and tricks for solving potential problems, but, in the end, your own drive and passion in facilitating these exercises are the keys that will make or break your sessions.

On setup

Facilitating most of these exercises comfortably requires a room that can accommodate all your participants in a circle. The ability to move chairs to create a large space or multiple groups is essential for all of the included activities.

We've presented all exercises in this book in the same format so they're easier to read and enact. To demonstrate, here's an example activity you can use in just about any scenario.

Example: "If you really knew me"

Laura Hilliger

> EXERCISE
>
> Time required: 10–15 minutes for up to 20 people; 20 minutes for up to 50 people
>
> Materials necessary: A circle of chairs
>
> Activity type: Introduction

Both leadership and team development from training and bonding exercises are contingent on creating a space that eliminates preconceived hierarchies. Any successful participatory workshop starts by shifting the power balance participants are expecting. This exercise is a great way to initiate any of the activities included in this book.

Facilitation steps

STEP 1. Before the session, move all the chairs into a circle and put a big sheet of paper labeled "Parking Lot" on the wall.

STEP 2. As people join the session welcome them and chat with your participants. Announce that you'll give everyone a few minutes to join, and allow everyone to settle into the chair of their choosing.

STEP 3. Once people have settled in, have a seat in the circle. Do not introduce yourself.

Step 4. Say a sentence of welcome and briefly introduce the topic your workshop is covering. Do not go into detail explaining the topic, simply explain that today is about a particular theme. For example, you might say something like: "*Today we're going to have a critical look at diversity and inclusion. It's a complex topic, so throughout the day, if you have ideas or questions about this topic, but don't want to bring them up in the current exercise, you can add them to the Parking Lot. At the end of the session, we'll have a look at those items and begin any discussions. This is a participatory session. We'll have active discussions and debates. Be respectful of the people around you. If you are the type of person who talks a lot, try to listen more. And if you're the type of person who doesn't speak much, please speak up and share your ideas. The more you put into this session, the more successful learning experience it will be for everyone.*"

Step 5. Do not talk for more than 60 seconds!

Step 6. Say: "*We'll start by introducing ourselves but to avoid an endless round of introductions, we're going to follow the format I'll demonstrate.*"

Step 7. Say "*Hi, my name is [name].*"

Step 8. Say "*I'm from [city, company, team or department].*"

Step 9. Say, "*If you really knew me, you'd know that [a fun fact about you].*" Examples might include: "*If you really knew me, you'd know that I hate raw tomatoes,*" or "*If you really knew me, you'd know that I was born in Bolivia,*" or "*If you really knew me, you'd know that I have two left feet and can't dance at all.*"

Step 10. Once everyone has introduced themselves, explain the first exercise.

Laura Hilliger is a writer, educator, and technologist. She's a co-founder of the We Are Open Co-op, an Open Organization Ambassador at Opensource.com, and is working to help Greenpeace become a more open organization.

Unit 1: Transparency

Introduction: What is transparency?

Dr. Philip A. Foster

We hear about transparency a great deal, especially in the context of open systems. But what does "transparency" really mean?

Its literal translation is "the ability to see through something." However, in the context of open systems, transparency is the product of sharing of something in such a way that all are aware of it and can see it.

When "open" becomes a systematic, cultural approach to operating an organization, transparency becomes one of its key components. Open organizations embrace transparency because they focus on keeping information, knowledge, skills, and process out in the open for all to access. Here, "transparency" connotes an environment where the free flow of information enhances collaboration, because transparent processes tend to invite all members of the organization to participate in them.

This approach to constructing organizational culture is valuable for helping overcome biases and office politics. A decision is "transparent" when made not in a vacuum but "in the open," where everyone can contribute to the decision making process.

Transparency creates a healthy tension within the company's ecosystem. When properly engaged, transparency creates an environment where people can freely contribute, come up with better solutions, and share equally in the outcomes of those solutions. Without transparency, decisions can appear arbitrary—even without merit. Transparency, then, ensures that organizational members receive all the information necessary for embracing the reality of each circumstance; it forces leadership to share complex issues with the broader population of the organization.

A high degree of transparency coupled with explicit communication allows members of an open organization to get behind a problem and advance the best solutions possible. Conversely, organizations that lack transparency tend to create a workforce that is helpless to affect positive and useful change in the organization.

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How working transparently united our engineers

Jordan Morgan

CASE STUDY

Organization: Buffer

Employees:

Industry: Social media management

Challenge: Extend the company's cultural emphasis on transparency to its work developing software

It's incredible to think about how much has changed for technology companies in the last decade. Start ups pop up seemingly by the hour. The most financially successful company on earth freely shared an entire programming language[5]. And the open source community is thriving in ways we didn't think possible.

In short, transparency seems to be spreading in many different forms.

It used to be the case that some facet of leadership didn't want information freely and transparently shared across an organization. But it's different now. The prospect of sharing your business' most sacred commodities or secrets is no longer off

5 https://www.apple.com/newsroom/2015/12/03Apple-Releases-Swift-as-Open-Source/

limits. The way we think about transparency in the workplace is changing, and we all seem to be keenly aware of it.

It's exciting, but what does transparency really *do* for a company? How does it help, and what problems does it solve? How can it go from being a great one liner on your company's "About" page and grow into a tool to leverage across your teams?

I work as an iOS developer at Buffer, one of the most open tech companies around[6]. I've seen transparency in action for several years now and firmly believe it can streamline solutions to many different problems.

I'll walk you through a recent challenge we faced internally at Buffer and show how transparency helped play a pivotal role in fixing it.

You're transparent—now what?

At Buffer, we've instilled transparency as a core value impacting the way we do things across the company. Our revenues, profits, and stock information is open for anyone to see. Our employee salaries are public domain. Even our product road map is accessible to anyone that has access to the internet[7].

You'd think that as a transparent tech company, we'd be heavily involved with the open source community too. It should be inherent to our culture. And it was, but really only in the sense that we *used* plenty of open source code. We just weren't sharing much of our own.

Why?

6 https://www.inc.com/jeff-haden/inside-buffer-company-complete-transparency.html

7 https://buffer.com/transparency

I spent time really grappling with that question. How come we weren't sharing more code to the open source community?

What I discovered is that even though we were a transparent company, we needed to learn to *leverage* that freedom of choice, knowledge, and autonomy in an deliberate, actionable way.

In this case, transparency was both part of our problem and nearly the entire solution.

Diagnosing issues via transparent communication

We only recently discovered this open source contribution gap at Buffer. It's something that most of us just assumed was happening due to our transparent nature. Sure, there were a few projects we had open to the public, but there were certainly things we could've released and made the community more aware of.

It was something our CEO, Joel Gascoigne, noticed, too. In our internal tool for communication, Discourse, Joel raised the question more or less asking "Why do we not open source more of our code?"

It was a fair question to ask, and one that would've just began and ended as a casual talking point in a meeting—if it hadn't been posed to the entire company.

This is the first point at which transparency worked to solve a problem we had. It made us realize which people were in a position to take on this challenge—and how they were spread far and wide across the company. It also initiated a dialog between all of us in a natural way, to get the conversation started. It's a stark contrast to the closed doors, "higher ups" meetings that seemed to be standard at other companies I've worked for.

From talking around the company, it was clear that we were in a unique position to share our code with the world. Our CEO approved of doing it, our direct management thought it was a great practice, and our engineers were eager and willing to contribute.

For us at Buffer, the issue was never "we shouldn't do this" or "we don't have the time." In fact, it was quite the opposite. By chatting with different engineering teams, I soon learned that the problem was simply that we didn't know how.

Finding the answer

Arriving at that conclusion took some digging. I started taking notes about the barriers engineers claimed they encountered when attempting to work with open source code, and I posted those to a public document for others to collaborate on. After three or four informal chats, all of the engineering teams had created a rough outline of any roadblocks that existed and the various forms of stop energy they were hitting.

The above paragraph will either seem very practical and uninteresting to you—or radical and different depending on the type of company you work for.

I've been in both corners of the room: the one where the managers take action without much input from the team and work alone to produce change, and the one where everyone is called upon to be part of the solution and identify the real, common problems.

When you practice the latter more than the former, you start to cultivate a sense of empathy for your team—as well as a stronger degree of trust. You don't have all the answers; no single teammate likely does. But if you form them all together, a clearer sense of direction results.

At Buffer, I ended up creating nothing more than a public FAQ that helped engineers open source their code. It had the answers to the questions we were asking *ourselves* but not *each other*, and it outlined logistical steps to making code public (along with few tips on how to share it).

That's exactly all we needed: fewer assumptions on the state of open source and a quick write-up explaining how to share our code. Since the creation of that simple FAQ guide, 80% of our open source projects have been released.

The best part? We've since shared that FAQ[8] with the world too, in the hope that it could help solve the same problems at other tech companies.

Leveraging transparency

That small example of transparency in action might seem to have a bit of an anticlimactic ending—until you consider the way it helped us get where it did.

First, our CEO initiated a dialogue across the board about the state of open source. Then, engineering teams started to realize that not many of us were actually open sourcing code. At this point, the floor was open to let anyone who felt they could help solve the problem to freely jump in.

In this case, that was me. I made sure anyone who had ideas on how to get open source rolling would have their ideas heard, and went to all of the teams to figure out ways to do it. This was quick to do, because at this point we were all aware of the problem I was trying to help solve. The proper steps forward came into focus directly from this clear, encouraging, and egoless communication.

8 https://open.buffer.com/guide-open-source/

Now, consider this: What if Buffer did not have a culture of transparency in this particular case? What might've happened, and why did transparency help?

Traditionally, managers might've huddled together and thought of ways to encourage their team. A brainstorm meeting likely would have occurred, and people might have tossed ideas back and forth. Then they may have agreed on a course of action put it into place.

Business has been done this way for a long time, and there is certainly nothing right or wrong about those methods. But we're not asking if it's right or wrong; we're pondering how transparency helps in the workplace.

In that case, then, we can anticipate problems arising from the fact that (in this scenario, anyway) the people working toward solving the "end goal"—in this case, open sourcing code—were not the ones involved in making the decision on how to do it. The *real* issues that may have existed or the barriers in place might not have ever been known to the managers trying to solve the problem.

Further, managers are just that: managers. They are skilled, empathetic team leaders who help ensure their units succeed and have what they need to do so. But they aren't typically on the front lines, like the employees they manage. When they work without the context of their front-line teammates, they often have difficulty getting the amount of information they need to get at the heart of an issue. At worst, their work becomes a series of wild guesses.

This works both ways, too, as managers have valuable insight that those who are on the front lines often don't. Considering this, it stands to reason that the best way to make work more efficient is to ensure that both sides have an open line of communication they can use to bounce ideas back and forth. If that line only travels one way or the other, then communication becomes less collaborative, informative, and helpful—and more of a firm decision that seemingly came out of nowhere.

Consider that last point for a moment. In this case, not only did the solution to open source more code come from those without all the context required, but it could also can come across as an unexpected failure to the team. Thoughts like "Where we not doing a great job here?" or "I didn't even know that was a priority" could be common.

Thankfully, everyone can effectively side-step scenarios like that with open, honest, and collaborative communication. Transparency is not a silver bullet for your entire business—but it certainly can help when it comes to fostering empathy, knowledge, and trust among your team.

Considering transparency

We've seen that transparency in the workplace can be a very powerful tool. If used properly, it can ensure that the right people have access to the right things. It can enable outside perspectives and additional context that might've been lost without it. If you choose to make some parts of your organization (or all of it!) embrace transparency, then be willing to tackle problems that your team encounters and be passionate about solving them.

But your actions have to meet your ambition. Simply *wanting* to be transparent isn't enough.

At Buffer, we wanted to open source more code, we had the green light to do it, we had plenty of helpful code to share—but *wanting* to share it was usually where the story ended. We had to bring all of these ideas together into one, cohesive, and comprehensible flow—a flow formed by taking input from the whole team, leaders, and the community to create something truly useful.

The magic, then, comes about when you encourage your team to be transparent while matching all the ideas that sprout up into decisions taking place—either now or later. The magic, then, arrives as you encourage your team to be transparent and commit to hearing everyone's input. You'll likely find yourself with more ideas than you'd have gotten if you'd taken a different approach. Take your time, weigh the options, and follow through. Then you'll be in a great place to take some action. Organizations have never lacked decision makers. What they *have* historically lacked is important context.

You wouldn't buy a house without first asking your partner or family what would work best for them, what price is most affordable, or where you should live. You open a dialog, allow others to be a part of it, and *then* get things done.

The same should be true in any organization today, and transparency can help foster it.

Jordan Morgan is a iOS developer at Buffer. He is from Ozark and also founded Dreaming In Binary. He is focused on helping the community, creating things that inspire others, doing talks over iOS, and constantly being a student of any form of software engineering.

Review and discussion questions

• "In short, transparency seems to be spreading in many different forms," Jordan writes. Do you agree? Have you sensed your team or organization increasing its emphasis on operating transparently? How will your team respond to this cultural shift?

• At Buffer, Jordan realized that he wasn't the only developer who felt strongly about working more transparently—he just didn't initially know how to gather like-minded developers and coordinate their work. Do any similar barriers exist on your team, in your department, or across your organization?

• Jordan describes two approaches to leadership: "the one where the managers take action without much input from the team and work alone to produce change, and the one where everyone is called upon to be part of the solution and identify the real, common problems." Which describes your approach to leadership? What about the leadership on your team? Is this something you can change, or would like to? Why or why not?

Making transparency work for Harvard's Dataverse Project

Philip Durbin

CASE STUDY

Organization: Dataverse Project at Harvard University

Employees:

Industry:

Challenge: Work transparently to help researchers share data

A culture of transparency permeates the Dataverse project, contributing to its adoption in dozens of research institutions around the world. Headquartered at Harvard University, the Dataverse development team has more than a decade of experience operating as an open source project within an organization that values transparency: the Institute of Quantitative Social Science (IQSS). Working transparently helps the Dataverse team communicate changes to current development efforts, provides opportunities for the community to support each other, and facilitates contribution to the project.

Dataverse is open source research data repository software, a platform for sharing and exploring research data. In June 2007, Dataverse developers published the first open source commit to the project, but precursors to Dataverse date back to 1987. With help from the community, the Dataverse development team completed a code rewrite in 2016, which led to a significant growth in adoption. As of 2017, 26 institutions around the world run Dataverse in production and three installations, including Harvard Dataverse, offer data hosting to any researcher in the world.

Transparency from top to bottom

The Dataverse project emerged from IQSS, an organization that promotes visibility into its various operations. The IQSS webpage of roadmaps[9] indicates the institute's level of commitment to transparency, stating:

> We maintain these development roadmaps publicly so that all our faculty, students, and staff can remain on, or at least work from, the same page; we give everyone complete visibility into what IQSS is working toward, how we are going about it, and when we plan to get there. For each area of development, you will find the big picture and ways to drill down to whatever level of detail you desire; for some, you will find ongoing community discussion forums, and in many you can even see the raw computer code we are in the process of writing. We realize that this level of transparency is highly unusual in a large complex environment like Harvard, but our research indicates that we do a much better job when involving our community in our operations and empowering its members to fuel the growth and improvement of our products, services, and activities.

9 https://www.iq.harvard.edu/roadmaps

Support for transparency from its parent organization helps the Dataverse team feel comfortable opening up. The project's public roadmap provides an overview with links to dive into fine detail of any particular feature or bug. The roadmap also enumerates the project's strategic goals, helping set expectations with the community regarding project priorities. The team communicates changes to the roadmap on the public "dataverse-community" mailing list as well as on biweekly community calls. (The calls are not recorded but participants collaborate on taking notes and send them to the public mailing list.) At the annual community meeting, the team presents the roadmap and reflects on accomplishments from the past year. Planned releases on the roadmap link to a public kanban board, displaying the status of various issues as they move from the backlog to development, code review, and QA. In short, development is an open book, and the community can follow along with every chapter and even help tell the story.

Transparency in support

As adoption of Dataverse has grown, the community has become better able to support itself. Community members ask and answer questions in public channels, building a knowledge base accessible by any search engine. The team encourages the community to be bold about posting questions to the mailing list and the publicly logged IRC channel. The community is eager to help all members succeed, and the strengths of individual community members shine through.

Transparency in contribution

Increasing contribution is one of the strategic goals of the Dataverse project and the team actively asks questions that encourage publicly contributing to the project such as the following.

- "Can you please open an issue?"
- "Are you interested in making a pull request?"
- "Can you please participate in a community call so we can hear more about your idea?"
- "Can you please start a thread about your idea on the mailing list?"

The community contributes by providing ideas, improving documentation, participating in usability tests, and writing code. Recently the team started tracking community development efforts on a public spreadsheet so that it's clear who is working on what and can provide status updates on various initiatives. As members of the community make progress, an issue number is added to the spreadsheet, followed by a pull request number. By having conversations in the open, the community keeps abreast of current efforts of their counterparts at other institutions, or even the same institutions.

Challenges in transparency

Transparency is not without its challenges. Open source newcomers, both internal and external to the Dataverse project, can find a high level of transparency scary. What if people don't like my code or my design? What if the issue I open is a false alarm? What if my problem is due to something I did wrong? Nagging doubts like this are normal and as a community we must constantly remind each other that we'd rather hear an imperfect idea than nothing at all.

Security deserves special mention in the context of transparency. Like many projects, Dataverse has a private email address for receiving reports of suspected security vulnerabilities. It would be irresponsible to put customers at risk with completely open discussion of security concerns.

Transparency in design presents some challenges as well. In a talk at Ohio Linux Fest 2017, Máirín Duffy from Red Hat explains "the big reveal" from design culture and how the "release early and often" mantra heard so often in open source can be difficult for designers who prefer sharing curated, polished designs. Lately the Dataverse project has been posting unpolished designs on a separate kanban board that is public but not announced. Mockups from the board appear in usability tests and are refined until they are ready to be included in a development sprint.

Results

A positive response from the Dataverse community during a retrospective at the most recent community meeting has encouraged the team to continue working transparently. The community loves the community calls and only wants more notice about agenda topics and reminders to call in. They appreciate the open roadmap. They asked for issues to be flagged with "help wanted" if there is a way they can contribute. They asked for assistance understanding the system used to write documentation so they can help. In short, more information is better. Putting information into the open—rather than in private emails and messages—maximizes the value of our keystrokes.

Philip Durbin is an open source developer who has contributed to Dataverse, a platform for sharing research data. You can read more about him at his personal website at greptilian.com.

Review and discussion questions

- Phil acknowledges that "support for transparency from its parent organization helps the Dataverse team feel comfortable opening up." Do you think your team's efforts to become more transparent would receive similar support from its parent organization(s)? Why or why not?

- Even a thoroughly transparent organization like the Dataverse Project encounters challenges to operating with complete transparency. Does your team or organization share any of Dataverse's challenges? What unique challenges to transparency does your own organization seem to have?

- Phil explains specific steps the Dataverse community took to make its support processes more transparent. Could your organization do something similar—either from internal or external customers? Why or why not? If not, what *could* your organization do to make support efforts more transparent?

A three-step process for making more transparent decisions

Sam Knuth

EXERCISE

Time required: 3–6 months

Materials necessary:

Activity type: Action

One of the most powerful ways to make your work as a leader more transparent is to take an existing process, open it up for feedback from your team, and then change the process to account for this feedback. The following exercise makes transparency more tangible, and it helps develop the "muscle memory" needed for continually evaluating and adjusting your work with transparency in mind.

I would argue that you can undertake this activity this with any process—even processes that might seem "off limits," like the promotion or salary adjustment processes. But if that's too big for a first bite, then you might consider beginning with a less sensitive process, such as the travel approval process or your system for searching for candidates to fill open positions on your team. (I've done this with our hiring process and promotion processes, for example.)

Opening up processes and making them more transparent builds your credibility and enhances trust with team members.

It forces you to "walk the transparency walk" in ways that might challenge your assumptions or comfort level. Working this way does create additional work, particularly at the beginning of the process—but, ultimately, this works well for holding managers (like me) accountable to team members, and it creates more consistency.

Phase 1: Pick a process

STEP 1. Think of a common or routine process your team uses, but one that is not generally open for scrutiny. Some examples might include:

- Hiring: How are job descriptions created, interview teams selected, candidates screened and final hiring decisions made?
- Planning: How are your team or organizational goals determined for the year or quarter?
- Promotions: How do you select candidates for promotion, consider them, and decide who gets promoted?
- Manager performance appraisals: Who receives the opportunity to provide feedback on manager performance, and how are they able to do it?
- Travel: How is the travel budget apportioned, and how do you make decisions about whether to approval travel (or whether to nominate someone for travel)?

One of the above examples may resonate with you, or you may identify something else that you feel is more appropriate. Perhaps you've received questions about a particular process, or you find yourself explaining the rationale for a particular kind of decision frequently. Choose something that you are able to control or influence—and something you believe your constituents care about.

Step 2. Now answer the following questions about the process:

- Is the process currently documented in a place that all constituents know about and can access? If not, go ahead and create that documentation now (it doesn't have to be too detailed; just explain the different steps of the process and how it works). You may find that the process isn't clear or consistent enough to document. In that case, document it the way you *think* it should work in the ideal case.
- Does the completed process documentation explain how decisions are made at various points? For example, in a travel approval process, does it explain how a decision to approve or deny a request is made?
- What are the *inputs* of the process? For example, when determining departmental goals for the year, what data is used for key performance indicators? Whose feedback is sought and incorporated? Who has the opportunity to review or "sign off"?
- What *assumptions* does this process make? For example, in promotion decisions, do you assume that all candidates for promotion will be put forward by their managers at the appropriate time?
- What are the *outputs* of the process? For example, in assessing the performance of the managers, is the result shared with the manager being evaluated? Are any aspects of the review shared more

broadly with the manager's direct reports (areas for improvement, for example)?

Avoid making judgments when answering the above questions. If the process doesn't clearly explain how a decision is made, that might be fine. The questions are simply an opportunity to assess the current state.

Next, revise the documentation of the process until you are satisfied that it adequately explains the process and anticipates the potential questions.

Phase 2: Gather feedback

The next phase involves sharing the process with your constituents and asking for feedback.

STEP 1. Sharing is easier said than done, so:

- Post the process somewhere people can find it internally and note where they can make comments or provide feedback. A Google document works great with the ability to comment on specific text or suggest changes directly in the text.
- Share the process document via email, inviting feedback
- Mention the process document and ask for feedback during team meetings or one-on-one conversations
- Give people a time window within which to provide feedback, and send periodic reminders during that window.

If you don't get much feedback, don't assume that silence is equal to endorsement. Try asking people directly if they have any idea why feedback is not coming in. Are people too busy? Is the process not as important to people as you thought? Have you effectively articulated what you're asking for?

STEP 2. Iterate. As you get feedback about the process, engage the team in revising and iterating on the process. Incorporate ideas and suggestions for improvement, and ask for confirmation that the intended feedback has been applied. If you don't agree with a suggestion, be open to the discussion and ask yourself why you don't agree and what the merits are of one method versus another.

Setting a timebox for collecting feedback and iterating is helpful to move things forward. Once feedback has been collected and reviewed, discussed and applied, post the final process for the team to review.

Phase 3: Implement

Implementing a process is often the hardest phase of the initiative. But if you've taken account of feedback when revising your process, people should already been anticipating it and will likely be more supportive. The documentation you have from the iterative process above is a great tool to keep you accountable on the implementation.

STEP 1. Review requirements for implementation. Many processes that can benefit from increased transparency simply require doing things a little differently, but you do want to review whether you need any other support (tooling, for example).

STEP 2. Set a timeline for implementation. Review the timeline with constituents so they know what to expect. If the new process requires a process change for others, be sure to provide enough time for people to adapt to the new behavior, and provide communication and reminders.

STEP 3. Follow up. After using the process for 3-6 months, check in with your constituents to see how it's going. Is the new process more transparent? More effective? More predictable?

Do you have any lessons learned that could be used to improve the process further?

Sam Knuth leads the Customer Content Services team at Red Hat, and is an Open Organization Ambassador.

Exercise

Author P. Byline

Exercise
Estimated time to complete:
Materials needed:
Skill level:
Target behaviors:

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Unit 2: Inclusivity

Introduction: What is inclusivity?

Flavio Percoco

Inclusivity is the quality of an open organization that allows and encourages people to join the organization and feel a connection to it. Practices aimed at enhancing inclusivity are typically those that welcome new participants to the organization and create an environment that makes them want to stay.

When we talk about inclusivity, we should clarify something: Being "inclusive" is not the same as being "diverse." Diversity is a product of inclusivity; you need to create an inclusive community in order to become a diverse one, not the other way around. The degree to which your open organization is inclusive determines how it adapts to, responds to, and embraces diversity in order to improve itself. Interestingly enough, the best way to know which organizational changes will make your group more inclusive is to interact with the people you want to join your community.

Ideally, inclusivity and diversity should have no limits in your open organization. The more inclusive you are, the more variance you will be able to introduce in your organization. The more variance you introduce to an organization, the more that organization will be able to tolerate changes—and the more you will be able to leverage your organization's diversity to make it better.

Dimensions of inclusivity

We should remember another important point, too: Being inclusive means attending to more than categories like gender and race. Gender and racial diversity are absolutely critical to an open organization, of course, but they are not the only two factors that influence your organization's relative level of diversity.

Your organization should strive to have people from different cultures, people living in different parts of the world, people from different backgrounds, with different skillsets or ability levels, and living in different social realities, for it to *really* be diverse.

Cultural differences are some one of the most eye-opening qualities you'll see at work in any organization (even if we don't often hear about these difference on the news and social media.). Being deliberate about learning from the various cultural groups in your organization can realize just how biased or partial some aspects of your organization really are—and how much you can do to improve them.

Cultural diversity pertains to the different ways people solve problems, the way people talk, the hours people prefer to work, and the way leaders interact with members of their teams. People with different cultural backgrounds differ, for example, in how collaborative or individualist they are, or in the ways they interpret spoken or written language. Cultures can be similar to each other or completely different.

Building for inclusivity

Building an inclusive organization often means acknowledging that *your* way of doing things is not the *only* way of doing things. It often involves changing the *structure* of the organization to create an environment where everyone can feel safe and valued. You have to allow its members to change it (that's why inclusivity is so closely tied to *adaptability*, which is the subject of Unit 3). If members of a organization don't feel like they can adapt the community, then it's not inclusive. If proposing and making changes to an organization is difficult, then it's not an open organization.

The processes by which you make your organization more inclusive—and therefore diverse—not only will help it grow but also keep it from derailing. They will help members of your community interact with each other in a common, shared, and familiar environment—find those shared customs and norms that they not only live *with* but also live *by*). It is possible to create an environment that different people can feel comfortable with and it, of course, comes with some trade offs. What makes your organization inclusive is not the lack of trade-offs it makes but its ability to acknowledge these trade-offs, adapt to the member's needs, or provide alternatives when the specific changes they request aren't possible.

Inclusivity isn't about making everyone happy; it's about making everyone feel *comfortable*. Some people may not always be happy about some of the aspects of the organization, but they should never feel uncomfortable in the organization (or uncomfortable expressing their concerns about the organization).

Creating a more inclusive organization will likely involve making many changes, and (at the outset, at least) most of these changes ought to be small. There's no need to invert your organization overnight. You might start with the exercises in the following unit. By taking little steps towards a more inclusive and diverse organization, you'll be automatically inviting new members to join and help you out. Big changes can actually cause instability, which is something you may want to avoid, as there are other members in your community that need to adapt to these changes.

Ultimately, you can never be *completely* inclusive, because that would imply that the world has stopped changing and cultures have stopped evolving. You can, however, create an environment capable of adapting itself to the changes (or existing differences) the world may be going through. That's the essence an inclusive organization: its ability to adapt to our diverse world.

Flavio Percoco is a passionate developer, with interests in languages, cloud computing and distributed architectures. He's currently working for Red Hat where he spends most of his time hacking on OpenStack.

Case study

Author P. Byline

Case Study
Organization:
Employees:
Industry:
Challenge:

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Review and discussion questions

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A community-powered approach to diversity and inclusion

DeLisa Alexander

CASE STUDY

Organization: Red Hat

Employees: 10,000

Industry: Open source enterprise software solutions

Challenge: Involve the entire organization in diversity and inclusion initiatives

When it comes to building more diverse and inclusive companies, one of the biggest challenges CEOs and HR leaders face is how to inspire a passion for taking action across the entire organization.

Lots of potential interventions are available to organizations, but according to the recent Harvard Business Review publication "Why diversity programs fail," many of the typical command-and-control, top-down approaches to improving diversity and inclusion are not only ineffective[10]; they can actually have a negative impact.

So when it comes to diversity and inclusion, what's a company to do?

10 https://hbr.org/2016/07/why-diversity-programs-fail

At Red Hat, we decided to approach this challenge in the way that we approach most things: in the open source way. We published our employment statistics, and then engaged our entire organization—thousands of Red Hatters—to develop a global diversity and inclusion strategy.

Everyone's problem to solve

Red Hat's diversity and inclusion strategy grew from a single moment in 2014, when one brave Red Hatter raised their hand during our quarterly company meeting and asked, "When will Red Hat publish our diversity statistics?"

This question had been on my mind for a while. Other technology companies had just started to publish their employment statistics, as a way to highlight an industry-wide gap in diversity. Until that time, these statistics were considered highly confidential and sensitive company information, and were rarely shared.

My background is in law, and as an attorney, I tend to be a risk-averse person. Working in an open organization has often challenged me to balance that perspective with consideration for the enormous benefits of transparency. In that moment, I felt inspired about the opportunity to shift my mindset from defaulting to closed when faced with a problem too large for one team to solve, to defaulting to open, and engaging the entire Red Hat population to help us figure it out. It was our chance to show up as the open source leader on this important topic.

At that time, we were doing many wonderful things around the globe to try and make a difference—not just inside our own company, but also in open source communities and the technology industry as a whole. But our efforts often felt to me like pouring a bucket of water into the ocean, because there were few, if any, quick fixes. I knew from my own research that making a difference requires persistence, long-term investments, and sustained focus. We are a much smaller company than those we compete against, and most of the companies publishing their numbers had far greater resources available.

We started by pulling together a diverse, global, cross-functional advisory group to help us think through the process of publishing our data, as well as to help inform our next steps. Half of the advisory group were people who we asked for feedback and guidance as we prepared to publish our numbers; the other half would be filled later on, when we invited Red Hatters with a passion for diversity and inclusion to volunteer for the remaining open seats.

It's impossible to fully describe the groundswell of interest and passion we saw, both internally and externally, when we published our numbers. Immediately, a community of passion began to form inside our company. I was encouraged by how many Red Hat associates and managers reached out for the first time, whether privately or publicly, to express strong support for our efforts.

The overwhelming sentiment was not "What will Red Hat do to fix this?" but rather, "How can I help?" Red Hatters began sharing about their individual efforts all over the world, how they were already coming together to lead informal events like hackathons and coding classes targeted at underrepresented groups.

A community-powered approach

One of our early commitments to the company was a global strategy and roadmap. As we began to hear the stories of what Red Hatters were already doing, along with areas where they felt it was important for our company to focus our attention and resources, it seemed that the best way to develop our strategy and roadmap was to approach this challenge in a way that was open, inclusive, and grounded in research.

We wanted to build a strategy and roadmap that applied industry best practices as well as harnessed the unique aspects of our company's culture—our open source ethos, our passion for helping others, our strong sense of shared purpose. Most of all, I wanted to create something that every Red Hatter at every level of the company felt a sense of shared ownership in, something that gave everyone ample opportunities to make an impact.

We started by joining the Stanford University's Clayman Institute as partner. This organization is one of the leading think-tanks on diversity and inclusion. Dr. Caroline Simard from the Clayman Institute helped us develop a deck of research and findings that included compelling studies about the business value of diversity when it comes to things like innovation and long-term profitability. In addition, our research deck highlighted the important role that inclusion plays in unlocking those benefits, the challenges that individuals from underrepresented groups face in the workplace, and our own internal data alongside benchmark data from similar companies.

Our research deck offered a compelling case for focusing on diversity and inclusion, along with a reality check about how much work needed to be done within our company and the technology industry. But research alone rarely inspires action. We needed to bring the entire company along the journey, and give everyone space to grapple with their own concerns and uncertainties on this topic, while also creating an environment where everyone felt welcomed to ask questions and contribute ideas.

So we partnered with our Diversity & Inclusion Advisory Group to develop a first draft of a strategy and three-year roadmap. We shared our research deck along with the draft strategy and roadmap, which highlighted four proposed focus areas: senior leaders and influencers; diversity and inclusion communities (e.g. employee resource groups); recruit, develop, reward; and other talent and HR processes.

Then we invited everyone's feedback, ideas, and questions, through their choice of open and private channels. We received hundreds of comments, including helpful suggestions for the draft strategy and some debate about the research shared. At times, this open dialog was uncomfortable, and there were moments where we had to work hard to keep the conversation productive and feeling safe for everyone participating and reading. Yet making the deliberate choice to navigate those moments of tension when diverse perspectives come together had the benefit of creating a greater understanding between many of our associates, while also contributing to a more robust strategy and roadmap.

A marathon, not a sprint

It will take time to improve our numbers and drive significant changes across the technology industry, and it's far too soon to declare our approach a success. However, what I can see already is that approaching this challenge in an open source way has yielded a number of benefits that a top-down approach would not.

First, I'm continually amazed at the sheer passion and energy we see from our associates. Engaging our entire company allowed us to identify and focus on areas that they care most about, which in turn, inspired more action and effort from everyone. For example, within two years, we went from having one vibrant diversity and inclusion community (our Women's Leadership Community) to three, with the formation of BUILD (Blacks United in Leadership and Diversity) and Red Hat Pride

(LBGTQA), and one more under development for our U.S. veterans. We provided the toolkit and path for any Red Hatter to create a diversity and inclusion community, and sure enough, a number of passionate associates were quick to raise their hands and lead the formation process.

Second, we've seen remarkable leadership support. We took a similar approach with our senior leaders actively engaging with each, seeking to understand what they would be passionate about supporting and what concerns they had. I also provided them with their organization's data, along with the industry research. From those conversations, we put our heads together and came up with actions that were meaningful to them and tailored to fit their passions and their organization's unique needs. The result was a team of senior leaders who feel a passion for diversity and inclusion, and who actively advocate for it, each in their own authentic way. When I talk to HR leaders in other companies, I'm reminded of how difficult it is to inspire that level of support and engagement.

Third, we've seen an impact that goes far beyond our company walls. By coming together and sharing what we're doing, both inside and outside of Red Hat, we discover new opportunities where we can make a difference, as well as ways to get more value from our existing efforts. For example, this year, we added a new track to the Red Hat Summit called "Culture of Collaboration," with sessions focused on diversity and inclusion, the open source way, and how to make organizations more open and collaborative. Our customers and partners welcomed these topics, and those sessions sparked requests from Red Hatters to bring similar workshops to their customer and partner events.

One big takeaway that I've had from this experience is that diversity and inclusion is a personal topic. Although at times it's messy, I have also been surprised by how simple some solutions can be. Having an open environment where people feel free to share their perspectives gives you the opportunity to make changes that benefit others. For example, we learned from this process that many managers opened conversations with their teams by saying, "Hey guys," or "Hey, guys and ladies," which made some women on those teams feel uncomfortable. Now, we coach our managers to use "Hey team," a simple and more inclusive greeting that welcomes everyone without calling attention to gender.

We're in the second year of our strategy and roadmap, and there's always more to learn and discover. We continue to make adjustments based on research and feedback, and not every initiative is a resounding success. But by being transparent with our associates about our efforts, we are able to keep diversity and inclusion a top priority for our company, and inspire a remarkable number of Red Hatters to volunteer their time and energy to make a difference.

DeLisa Alexander is Executive Vice President and Chief People Officer at Red Hat. Under her leadership, this team focuses on acquiring, developing, and retaining talent and enhancing the Red Hat culture and brand.

Review and discussion questions

- DeLisa cites recent research indicating that "many of the typical command-and-control, top-down approaches to improving diversity and inclusion" have unintended)often negative or counterproductive) consequences. Why do you think this is the case?

- DeLisa writes that "research alone rarely inspires action." What can your organization do to spark new and productive diversity and inclusion initiatives?

- "Diversity and inclusion is a personal topic," DeLisa says. "Although at times it's messy, I have also been surprised by how simple some solutions can be." Can you name one small "simple solution" you could implement immediately to enhance inclusivity with your team?

Balancing agility and consensus

Peter Weis

CASE STUDY

Organization: Matson Navigation

Employees: 1,000

Industry: Global transportation and logistics

Challenge: Making quick decisions without compromising organizational support

I have always prided myself on being an inclusive leader, driven by a heavy emphasis on early consensus. Building that consensus pays dividends down the road as difficult decisions and strategies face their moments of truth. Major change is ultimately impossible without sustained organizational support, and it feels good and right to gain that support prior to proceeding.

However, after leading a gut-wrenching but successful multi-year technology transformation, I now view leadership in a more nuanced manner. While I still tend towards a democratic leadership style, I now know that no single leadership style is universally appropriate.

During times of great change, the urgency and a sheer number of key decisions to be made demand a faster decision-making process in order to ensure momentum and avoid getting bogged down. In this setting, pure democratic leadership doesn't fit. This is particularly true for traditional operating companies who have been successful and who have entrenched behaviors and attachments to the status quo. Fresh, courageous thinking is required.

A visionary leadership style that projects a confident and compelling view of tomorrow can increase speed without compromising organizational support during the inevitable difficult times. How?

Starting small

Let's start with how to make the right decisions more quickly. For nearly every critical decision, I now rely on a small, enlightened group of people who are unafraid to give me candid feedback and new ideas. Smaller teams are better. By creating the smallest group possible that allows you to get the right answer, you'll go faster without sacrificing quality.

In forming these small teams, you'll need your "Grade A" players, your best thinkers, by your side. After all, you may live with these decisions for years, either creating a new win or explaining a new loss. Speed is achieved by having the right talent and only the right talent involved in deciding on a strategic direction. As your strategy progresses, you'll find that as you work through one difficult decision after another, this speed effect will compound and can accelerate a transformational effort by months or years and save millions of dollars.

When the stakes are high, being right trumps being fully inclusive. Yes, this leadership style is faster, but there are trade-offs. How do you bring along those not directly involved in key decisions? Once you're confident you've made the right decisions, you've got some selling to do, and it will take investments in time you may not feel you can afford.

Critical buy-in

In order to ensure support for broad-reaching decisions, I've learned to lean heavily on change management practices. Early-on this was one of our blind spots that I wish I'd have addressed sooner. Dismissing these best practices as a "soft" skill is both pejorative and risky. Change management is a crucial and artful leadership skill that requires training and practice and can be harder to find than most technology and management skills.

During times of great change, achieving buy-in from those not directly involved requires more than saying "here is the strategy." It's not enough to just explain the vision and changes. Invariably, as you're talking about change and disruption, people naturally sift through your words, trying to figure out how it affects them. "What does this mean for my job? What will my role be? Will I have to learn new skills? Am I at risk?" Only when your staffs get answers that make them feel informed can they get on board.

Evangelizing your decisions, listening and spending time out in the field are important steps to build the support of those in less strategic roles. Staff will feel reassured by visionary leaders who take the time to communicate meaningfully. If your strategy is right, they'll rest easier knowing that a strong vision and plan to execute is in place. However, trying to communicate strategic shifts remotely, via email or video, is risky and in my view a serious mistake. Yes, it's time-consuming to spend time in person, particularly for a global organization. But it's absolutely crucial, particularly in the early days of change when trust is low and anxiety is running high. There simply isn't enough universally available bandwidth on the Internet to communicate emotions or to gauge reactions. Many leaders will feel they don't have the time for face-to-face gatherings. Great leaders must realize they don't have a choice.

Creating evangelists

You've probably heard the expression that "failure is an orphan but success has many parents." Said another way, if you've gotten your strategy correct and you've taken the time to evangelize and listen to your broader audience, those in the organization will follow and ultimately treat your decisions as their own.

By combining faster decision-making via your trusted "A Team" with a focus on evangelizing your message to your broader organization, you'll simultaneously achieve three critical goals:

- You'll build momentum by accelerating delivery
- You'll earn trust with the broader organization through candor and accessibility
- You'll begin to change your organization's culture as it becomes more comfortable with change

Get your decisions right as quickly as possible and tell your story with passion and confidence. Your organization will follow.

Peter Weis has more than 15 years of global CIO experience, and is currently VP and CIO of Matson Navigation, a $2B, publicly traded, global transportation and logistics company

Review and discussion questions

- Peter argues that "a visionary leadership style that projects a confident and compelling view of tomorrow can increase speed without compromising organizational support during the inevitable difficult times." How does he suggest leaders achieve this style? What are its characteristics, according to Peter? What characteristics would you add to his description?

- Peter suggests that "trying to communicate strategic shifts remotely, via email or video, is risky and in my view a serious mistake." Do you agree? Why or why not? Do you ever have difficulty communicating or evangelizing decisions across long distances?

- Peter stresses the importance of achieving widespread employee buy-in while retaining the ability to make decisions quickly. How do you and your team or organization manage this delicate balance?

A checklist for unbiased decisions

Yev Bronshteyn

EXERCISE

Estimated time to complete: 15 minutes first time (2–5 minutes subsequently)

Materials needed: Editable version of this checklist, or a printed-copy and a writing implement

Activity type: Reflection

Bias is the single greatest threat to the open organization. This is no exaggeration. In traditional organizations, responsibilities for evaluating ideas, strategies, contributions—even people—typically fall on (presumably) trained managers. In open organizations, that responsibility rests with contributors of all sorts.

"In organizations that are fit for the future," writes Jim Whitehurst in *The Open Organization*, "Leaders will be chosen by the led. Contribution will matter more than credentials [...] Compensation will be set by peers, not bosses." According to Whitehurst, an open organization is a meritocracy: "Those people who have earned their peers' respect over time drive decisions." But the way humans allocate their respect is itself prone to bias. And imagine what can happen when biased decision-making results in the wrong leaders being chosen, certain contributions being over- or undervalued, or compensation being allocated on something other than merit.

The following checklist covers several documented phenomena that, sometimes unconsciously, skew the decision-making practices.

The bias checklist

☐ **Has this person done a favor for you?** If so, you are more likely to impulsively do something that feels like a favor to them. This principle of reciprocity[11] is very powerful. This is why when charities send you solicitations by mail, they will often include address labels, calendars, other cheap goodies. When you feel like you've been given something, you are more likely to find yourself giving something back. Reciprocity is especially dangerous in an open organization, where the odds of two contributors having to evaluate each other's contributions are drastically higher than they may be elsewhere.

☐ **Has this person done something unfavorable to you?** Reciprocity works both ways[12]. Even if you can swear up and down that you're not the type who bears a grudge, if someone has previously rejected contributions from you, be especially alert for the desire to reject a contribution from them.

☐ **Has someone else done something particularly favorable or unfavorable to you?** While we're on the subject, be on the lookout for Generalized Reciprocity—a tendency to "pay it forward," or to "do onto others" what someone else has done to you. There has been evidence[13] of a higher tendency to pass on negative or unfair behaviors than positive ones, so if you feel "wronged" at the moment you're evaluating a contribu-

11 https://en.wikipedia.org/wiki/Reciprocity_%28social_psychology%29

12 https://en.wikipedia.org/wiki/Reciprocity_%28social_psychology%29

13 http://psycnet.apa.org/doiLanding?doi=10.1037%2Fa0031047

tion, this feeling can influence your evaluation. One study[14] found writing a message to the original perpetrator of an unfair or unjust behavior explaining your feelings can reduce your impulse to pass that unfairness onto others.

☐ **Have you already done something nice (however small) for this person?** This one's a bit more subtle than reciprocity, but no less powerful. Subscribe to the mailing list of a major political party, and you will be inundated with requests to fill out a survey or make a small donation (e.g., $1). These are effective solicitation techniques, because once you have done something positive for someone, you become more likely to do something even bigger for that person. This phenomenon is sometimes called the "Foot In The Door" technique[15]. If you have spoken favorably of an idea, a contribution or a contributor, or approved past work of the contributor, you will be likely biased in favor of that contributor.

☐ **Have you previously spoken ill of an idea, a contribution, or a person?** The same need for consistency with oneself that powers the Foot in the Door technique also works in the negative. If you have previously treated an idea, a contribution, or a person with disdain or have otherwise acted unfavorably toward a person, you will be predisposed to continue to act in that way.

☐ **Is the person good looking?** It has long-since been documented that the attractiveness[16] of someone performing a task influences our evaluation of how someone performs that task. This is an example of the Halo Effect[17]—a phenomenon

14 https://www.nature.com/articles/srep22316

15 https://en.wikipedia.org/wiki/Foot-in-the-door_technique

16 http://psycnet.apa.org/record/1974-25236-001

17 https://en.wikipedia.org/wiki/Halo_effect

whereby one attribute of a person leads us to assume or overestimate other attributes of that person.

☐ **Is the person successful or renowned in unrelated areas?** This is another example of the halo effect. For example, Stephen Hawking's anti-AI pronouncements[18] received wide press coverage across the world, even though all of Stephen Hawking's education and accomplishments are in physics and cosmology. Another example comes direct from the original *The Open Organization*. Whitehurst writes about how Gavin King (creator of the Hibernate Framework[19]) was allowed to embark on a new project to create a new language for the JVM. Today, that language, Ceylon[20], languishes in relative obscurity, compared to competing JVM languages Scala[21] (which has existed for years prior to Ceylon) and Kotlin[22] (released at about the same time). Data frameworks and programming languages are examples of substantially different areas, so it seems fallacious, in retrospect, to assume resounding success in one area would portend any success in the other.

☐ **Does a person or a contribution have similarities to someone or something you respect or admire, or dislike or oppose?** When making evaluations, we have a tendency to compare what we see to similar things from our own experience[23] and pass judgment based on similarity to those things. This is why, for example, political activists often like to compare the people they oppose to Hitler. None of those being

18 http://www.bbc.com/news/technology-30290540

19 https://en.wikipedia.org/wiki/Hibernate_%28framework%29

20 https://ceylon-lang.org/

21 https://www.scala-lang.org/

22 https://kotlinlang.org/

23 https://papers.ssrn.com/sol3/papers.cfm?abstract_id=1030517

compared have objectively committed wrongs even remotely resembling Hitler's mass murders, but the comparisons are driven by the intuition that any similarity to Hitler presents the target in a negative light.

☐ **Does this person meet or violate your norms for how a successful person looks?** Whether or not we admit it to ourselves, we all have biases and stereotypes for what a successful person in a field looks like. For example, when asked to picture a successful software engineer, many of us will think of a white or Asian male. While gender and racial biases have been widely discussed, awareness of them alone is not to compensate for their effect. We have to make these unconscious biases conscious and force ourselves to second-guess our judgments in their light.

Avoiding biases

Knowing about a bias may not be enough to prevent its effects. Many of us just aren't that good at correcting ourselves. This is why it's crucial to take steps wherever possible to avoid biases:

☐ **Evaluate contributions anonymously.** Orchestras, for example, will often audition musicians without seeing them. This practice has reduced the gender gap in major orchestras long before it became adopted by televised talent shows.

☐ **Define structured and rigorous evaluation criteria for people and contributions.**

Knowing about, and even anticipating, our biases is the first step in the journey to overcome them. But it is not the end.

Opening up on biases

Working through the checklist above, for instance, one may be attempted to acknowledge the *possibility* of the biases—

but ultimately deny experiencing them. Bad news: This may itself be a bias talking. Humans have been found to be overconfident in their abilities in virtually all areas, from driving[24] to investing[25]. So there's every reason to assume we may be overconfident in our own ability to screen ourselves for biases.

Fortunately, the structure of the open organization can help us overcome overconfidence. In *The Open Organization*, Whitehurst writes about the principle of *360-degree of accountability*, meaning "you are accountable to everybody." 360-degree accountability empowers participants to recognize biases not only in themselves (which is difficult to do) but also in others (which is easier). "My job is [. . .] to take questions and feedback and engage associates in a conversation about the decisions we're making as a team," Whiterhurst writes. Thus, in an open organization, it should be appropriate—indeed, encouraged—to ask, for example, "have you thought you might be biased in favor of X due to your prior positive statements about it?" The answer to the question, rather than a "yes" or "no," should be the concrete steps one has taken (or will take) to avoid bias. A reasonable response may be: "No, I haven't thought of it, but now that you mention it, let me ask Y, who has not dealt with X previously, for a neutral perspective."

When bias is acknowledged, discussed, and counteracted proactively and systematically, an organization becomes more deeply empowered to scale trust, responsibility, and accountability across the organization. An open organization relies on the soundness of human judgment across its ranks. Taking every

24 http://www.sciencedirect.com/science/article/pii/0001691881900056?via%3Dihub

25 https://www.cbsnews.com/news/how-overconfidence-hurts-investors/

possible step to make this judgment as objective and trustworthy as it can be is therefore absolutely imperative.

Yev Bronshteyn is a software engineer (with an open source governance bend) and occasional developer outreacher.

Unit 3: Adaptability

Introduction: What is adaptability?

Author P.. Byline

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Crowdsourcing the way to a more flexible strategic plan

Curtis A. Carver

CASE STUDY

Organization: University of Alabama at Birmingham

Employees:

Industry: Higher education (university)

Challenge:

When I became CIO at the University of Alabama at Birmingham in 2015, I confronted the same mandate every new IT leader faces when assuming the role: outlining, developing, and executing a strategic plan. The pressure to do this swiftly and immediately can be immense—and I think many CIOs feel compelled to articulate and hand down fully formed plans on Day 1. After all, that's typically the quickest way to assert your position and vision as a leader.

But I like to take a different approach. I don't dictate my team's initial goals. I open them up.

Working this way felt especially important in my new role at UAB, which I knew was going to be the last gig of my career. I wanted to make the largest contribution I could—not only to the university, but also to higher education in general.

What better way to do this than to let them openly contribute to the goals my team would be tackling during my tenure?

So I let the entire university community help me determine and prioritize our most pressing IT problems. The results were astounding, a perfect example of the benefits of taking an iterative, adaptive approach to this kind of development.

Let me share what happened.

Just a SPARK

My first day as CIO at UAB was June 1, 2015. That was also the day we launched a new, university-wide idea collecting and brainstorming platform. The platform (which we codenamed "SPARK," in honor of UAB's mascot, Blaze the Dragon), was a crowdsource-style tool for collecting and surfacing the best ideas for ways IT could improve the lives of students, administrators, and faculty.

Anyone could use the platform to submit an idea. "Help us understand the issues you're facing and what would make the biggest difference in your life," we told anyone interested in participating. "You can submit an idea that anyone can comment on, and as long as you play nice, everything is in scope."

Our goal was ambitious but clear: Identify 100 potential "wins"—100 things we could do to improve university life—in 100 days, then implement all of them within a year.

Within the initiative's first 55 days, 386 users posted 73 ideas, made 367 comments, and cast 1,747 votes. (Keep in mind, too, that this activity was spurred almost entirely by word of mouth during the summer, when a sizable portion of the faculty and students aren't even on campus.) As a result, we became aware of issues and ideas like:

- Electronic signature of documents as part of moving to a paperless system
- One gigabit bandwidth to the desktop
- Technology training and certification for IT pros and IT consultants
- Unlimited storage for all students, faculty, and staff
- Orientation for new IT employees

And those are just a few. While the ideas were flooding in, my team and I were taking meetings—hundreds of meetings (collectively), including several town hall-style gatherings to solicit feedback from the university community in an open forum.

In the end, we amassed an unbelievable amount of data. How were we going to sort it so the best ideas could rise to the top?

Making sense of it all

We began by arranging our crowdsourced suggestions into four primary categories:

1. Ideas that are great, but not directly applicable to the customer/community
2. Ideas for solutions that were actually already available as part of our current IT infrastructure and resources
3. Ideas that were clearly "quick wins," something we could implement in a day (or less)
4. Ideas that were groundbreaking and needed to be rolled into a broader strategic plan with a longer timeline

Believe it or not, most of the ideas we received fell into the first three categories. So our list of priorities was already becoming clear.

At the same time, our team was working with the insightful feedback we'd gleaned from our in-person meetings. Using mind-mapping software, we charted common responses and pain points, and connected these to our broader strategic goals and imperatives. All senior members of the IT leadership team contributed to this effort.

With that, we'd found our 100 potential wins. And true to our word, we got to work acting on all of them within the year.

The results are in

I'm proud to report that we actually achieved *147 wins* before the following June. I can't possibly recount all of them here. Many, however, were so startlingly simple—and yet so profoundly game-changing—that they seem almost laughably obvious in hindsight.

For example, take our approach to passwords on campus. Our policy really was outdated and ineffective, and we quickly learned that people disliked our approach to password security. So we modified aspects of it—first, our requirements for acceptable passwords (making them much stronger) and, second, our required interval for mandatory password changes (lengthening and aligning it with the operational rhythm of a university, so users needed to switch passwords less frequently). Members of the campus community appreciated these changes so much that they were literally hugging me on the street in gestures of pure joy—the first time in my career, I can honestly say, that's ever happened to me.

In line with another frequently received request, we worked diligently to increase the data storage limits for users on campus. This work seemed especially pressing—and the need so very obvious—when I learned from faculty researching Parkinson's disease that they weren't able to store all the highresolution brain scans they needed to do their work efficiently and effectively. Once we removed their data caps, they told me they were finally able to spend more time seeking a cure for Parkinson's and less time sorting through data files to make space for new work.

As we were steadily chipping away at our 100-win checklist, people around the campus couldn't help but take notice. My provost threw my team a surprise party (complete with delicious cake) to celebrate our crossing the 100-win milestone. Even the most skeptical members of the faculty senate stood up and applauded my team at a budget meeting (and our fiercest critics began saying things like "Well, while I don't think this is going to last long-term, I'm suspending disbelief because you've demonstrated you can achieve results"). And in another career-first moment for me, I got to serve as an honorary coach during the opening home football game. That's really when I realized that our community now viewed the IT staff as trusted partners in campus innovation. How many other IT organizations get recognized on the football field?

Lessons learned

I learned some valuable lessons during those 100 busy days. Here are a few of the most valuable:

Trust the community. Opening a feedback platform to anyone on campus seems risky, but in hindsight I'd do it again in a heartbeat. The responses we received were very constructive; in fact, I *rarely* received negative and unproductive remarks. When people learned about our honest efforts at improving the community, they responded with kindness and support. By giving the community a voice—by really *democratizing* the effort—we achieved a surprising amount of campus-wide buy-in in a short period of time.

Transparency is best. By keeping as many of our efforts as public as possible, we demonstrated that we were *truly listening* to our customers and understanding the effects of the outdated technology policies and decisions that were keeping them from doing their best work. I've always been a proponent of the idea that everyone is an agent of innovation; we just needed a tool that allowed everyone to make suggestions.

Iterate, iterate, iterate. Crowdsourcing our first-year IT initiatives helped us create the most flexible and customer-centric plan we possibly could. The pressure to move quickly and lay down a comprehensive strategic plan is very real; however, by *delaying* that work and focusing on the evolving set of data flowing from our community, we were actually able to better demonstrate our commitment to our customers. That helped us build critical reputational capital, which paid off when we did eventually present a long-term strategic plan—because people already knew we could achieve results. It also helped us recruit strong allies and learn who we could trust to advance more complicated initiatives.

It's more work. Sure, acting alone to sketch a roadmap for my first 100 days would have been easier. But it wouldn't have generated the results the crowdsourced version did. Without a doubt, collaborative approaches like ours require more work than solitary, draconian ones. You'll need to think strategically and long-term. (Case in point: Launching SPARK on June 1 actually required *three months* of planning and development leading up to that critical day.) But if you really seize this opportunity to engage with your community, you'll realize better results.

Our yearlong lesson in community-focused crowdsourcing revealed the benefits that adaptive approaches to strategic planning can have for our organization. I'm sure they can do the same for yours.

Curtis A. Carver Jr., Ph.D., is the Vice President and Chief Information Officer for the University of Alabama at Birmingham. In this role servant leader and enabler of others, he leads a team of dedicated professionals focused on providing solution to the UAB through world-class IT with a focus on innovation, agility and cost efficiency.

Review and discussion questions

- Would the kind of "distributed" approach to problem solving Curtis describes work for your team or organization? Why or why not? How might it affect your long-term planning efforts?

- Curtis says the crowdsourcing initiative revealed potential goals that "were so startlingly simple—and yet so profoundly game-changing—that they seem almost laughably obvious in hindsight." Can you identify any such goals for your team or organization? How might you articulate and organize them?

- Curtis describes several moments in which he was surprised by the community's positive response to his team's change initiatives. If you were to "open up" your strategic plan like he did, what might success look like for you? What kind of response would you expect from your customers and communities?

Assessing threats and opportunities

Jim Hall

EXERCISE

Estimated time to complete:

Materials needed:

Activity type:

You may be familiar with the "SWOT" decision-making tool. It's a methodology for helping teams clearly outline a set of conditions, compare options, and make transparent decisions based on an idea's Strengths, Weaknesses, Opportunities, and Threats ("SWOT"). SWOT is an efficient tool in my strategic planning toolkit.

However, I find engaging in SWOT directly can lead to some confusion. While team members may be able to easily identify "Strengths" and "Weaknesses" (those are fairly straightforward concepts that most teams are probably thinking about already), I find folks tend to struggle with "Opportunities." What is an "opportunity"? In meetings, people may equate "opportunity" as a business opportunity, which isn't the point of the SWOT exercise. Or they get stuck on "Threats." The word carries a different meaning in digital technology work, especially if you work in security: "Threat" often means "hacker." Instead, you really want participants to identify trouble spots down the road.

In my experience, it's easier to not address SWOT directly, but to come at it from a different direction. You may be familiar with a "Plus/Delta" exercise. At the end of a meeting or after an event, you might talk about the things that went well (Plus) and the things to change for next time (Delta). I find that combining this language with a traditional SWOT approach to project planning can lead to more flexible and effective results.

This exercise explains how to do it. It involves two "phases" of work. The first consists largely of preparation; the second is execution.

Facilitation steps

Phase 1: Preparation

STEP 1. Draw a standard Plus/Delta diagram (see Figure 1).

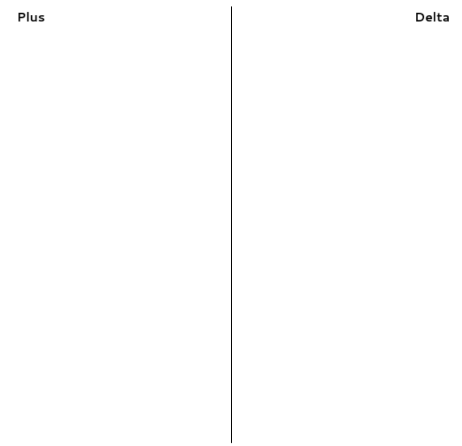

Figure 1

STEP 2. Divide the "Plus/Delta" into two timeframes: "Now" and "Future." You can specify or define these if you need to. For example, you might define "Now" as any time in the next three months, and "Future" as a year or more from now. Use whatever timeframes make sense for what you're after (see Figure 2).

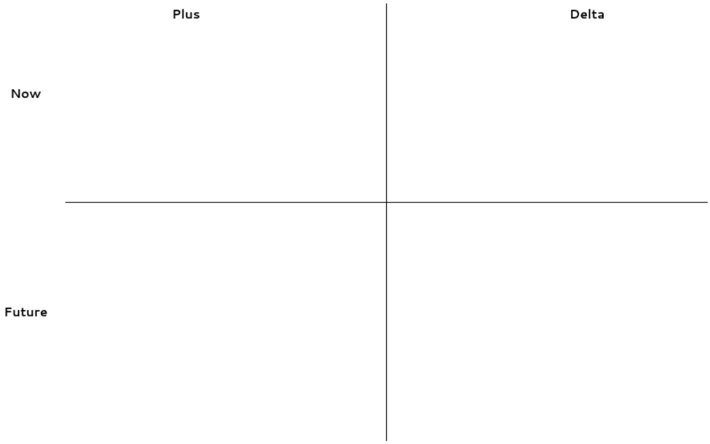

Figure 2

That's a very easy grid to understand. Most people can talk about what's going well now (Plus-Now) and what things we should change over the next quarter (Delta-Now). And team members can envision what things will be strong for the team in a year's time (Plus-Future) and what things we should change within the next year so they won't be obstacles down the road (Delta-Future).

And when you think about it, that's really what SWOT is about (see Figure 3):

- Strengths (Plus-Now)
- Weaknesses (Delta-Now)
- Opportunities (Plus-Future)
- Threats (Delta-Future)

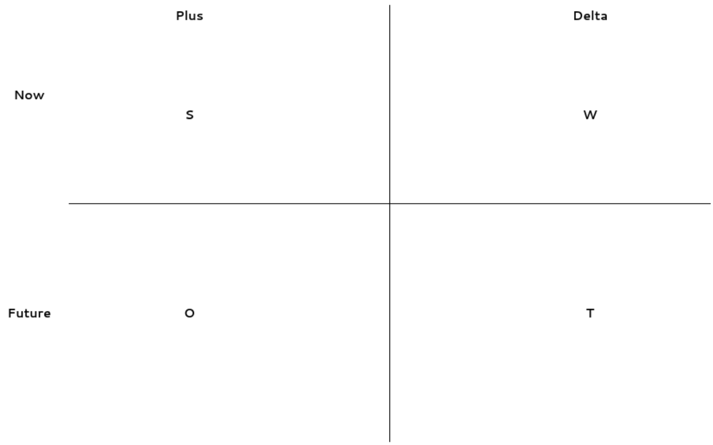

Figure 3

Phase 2: Execution

STEP 1. At your next team meeting, frame discussions using this modified SWOT analysis. What decision are you asking people to focus on? Are you reviewing new technology? Are you discussing a possible change to the infrastructure? Are you making some other decision?

STEP 2. After framing the discussion, ask everyone in the room to take some thoughtful time to consider the issue and jot any ideas on a piece of paper. What is going well now (Plus-Now)? What things should we change now (Delta-Now)? What things do you expect will continue to be strong for us next year (Plus-Future)? What things do we need to change in the next year so we don't run into problems (Delta-Future)?

STEP 3. To aid discussion, break up the room into small groups, each with about five people. Have each group discuss each quadrant of the SWOT as a group. Give them fifteen minutes to highlight, review, and agree to their group's top three Strengths, Weaknesses, Opportunities, and Strengths.

Reflection

After the room has discussed the aspects of the decision, bring everyone together to discuss. Go around the room, and ask each group to identify one item from each quadrant: What is going well now (Plus-Now)? What things should we change now (Delta-Now)? What things do you expect will continue to be strong for us next year (Plus-Future)? What things do we need to change in the next year so we don't run into problems (Delta-Future)?

For example, start with Plus-Now, and ask: "*Group #1: give me one item that is working well now; Group #2: what's something else that is working well today?*"

And so on. Draw the Plus/Delta, Now/Future grid on a whiteboard, and capture each idea in this grid so everyone can follow the discussion. Plan for the group discussion to take about twice the time you give the individual group time. So if you have people break into groups for fifteen minutes, I find it will take about thirty minutes to do the whiteboard discussion at the end.

Jim Hall is an open source software developer and advocate, probably best known as the founder and project coordinator for FreeDOS. Jim is also very active in the usability of open source software, as a mentor for usability testing in GNOME Outreachy, and as an adjunct professor teaching a course on the Usability of Open Source Software.

Utilizing pausers and pouncers

MaryJo Burchard

EXERCISE

Estimated time to complete: 15–20 minutes (up to 20 people); 25–30 minutes (up to 50 people)

Materials needed: Digital slide deck, yellow "pause" sign, green "pounce" sign, score cards (numbered 1–10, one per person)

Activity type: Reflection

Those who work in and with open organizations are in many ways champions of change; that's what makes their products so agile.

But the adaptability inherent to product development doesn't always translate to the organization's entire culture. After a product has been developed, it often meets resistance (whether internally or from the client) when people realize that proposed changes will cause fundamental shifts in the nature of their work.

Suddenly, despite the fact that they may be able to recognize an idea as a significant improvement, people either actively or passively stymie its implementation.

Why?

What if the biggest drag in change management is not resistance to *change*, but resistance to *being misunderstood, misrepresented, invalidated*, or lost in the process? Adaptability to sustainable change requires disruptive organizations to help their people achieve levels of agility that match the relative speed of their systems and products. I suggest that this begins with understanding how our people are wired.

Adaptability requires two things:

1. Capacity to proactively adjust to changes in the environment, and
2. Capacity to sustain the adjustments that are made

These capacities express themselves in two competing, initial responses to change:

- The capacity to adjust to change requires a tendency to pursue growth, challenge, and expansion (that is, to *pounce*).
- The capacity to sustain change requires a tendency to mitigate risks, optimize stability, and take precautions (that is, to *pause*).

Both responses are necessary, but the *equilibrium* of those responses in balance actually adjusts with the urgency and significance of the change at hand.

Optimizing functions and exploring new capabilities requires understanding of how a product is designed. The same is true for people. Each person is hardwired with a unique initial response to change that expresses as either *pounce* or *pause*. To build adaptable teams and agile people, leaders need to understand how each person is innately designed to respond when they encounter change. Then leaders can leverage people's design strengths to optimize their role and contribution in moments of transition and rapid change.

Facilitation steps

STEP 1. Create a presentation slide deck containing the slides described below:

- Yellow "pause" sign

- Green "pounce" sign
- A score card, numbered from 1 to 10, each number with a green dot and a yellow dot next to it

Prepare enough yellow and green signs and score cards for each exercise participant.

STEP 2. Distribute a set of each sign, plus a score card, to each person present.

STEP 3. Explain:

"*We are going to engage in an exercise that will begin to help you understand your natural, knee-jerk reaction to change when you initially encounter it. You'll notice that you each have your own green 'pounce' sign, and yellow 'pause' sign. This is what each sign means.*

The Pause sign can mean any one or all of the following:

'Wait! I need more information. I'm not yet convinced this is a good idea. What are the risks of doing this? Have we considered the consequences? What about what we're losing? We've done a lot to get here. This seems like it could compromise our stability.'

The Pounce sign can mean any or all of the following:

'Let's go! We can get the details while we're moving. This might be a great idea—but we'll never know what's out there until we get there. We could be the first! We could be even better! Imagine all the possibilities! Let's shake things up—the adventure is worth the risk.'

STEP 4. Explain:

"*In a moment, we will see a series of statements flash on the screen. As soon as you read the statement, flash either the green or yellow sign immediately. Don't fool yourself; there are no right or wrong responses, so don't overthink! None of these statements are based on anything happening in reality, so just be present in the moment. Read the statement and hold up the* *color that best represents the way you feel right then—in that very initial moment. Let's try a couple for practice.*

STEP 5. Flash the following sample slides:

- "I'm handing you a surprise new flavor of ice cream!"
- "We're leaving for the weekend – to a city you've never been!"

STEP 6. Ask:

"*Did you notice how quickly you responded? Did you see how people responded around you? Let's try the exercise for real, now. We'll be pausing between slides so you can record your answers on the score card. Are you ready?*"

STEP 7. Each statement below should be on its own slide, so show one slide at a time and flash it for no more than 10 seconds:

1. We're painting your living room a radically different—but wonderful—color tomorrow.
2. A famous hairstylist is coming to cut your hair in a new style after work.
3. You're being transferred to a new team next month.
4. You'll be moving to another country before the end of the year.
5. You are changing primary clients—and your new client has very different focus and priorities from what you're used to.
6. You've been selected for the next season of *The Amazing Race*.
7. Your turn to sing in karaoke—and all the songs are only vaguely familiar.
8. You've been given tickets to a concert for a band/artist you've never heard of.

9. You are in an emergency one-hour meeting to help your team leader make a crucial decision.
10. You just inherited a new high-stakes project with a very short timeline.

STEP 8. Ask:

"*If anyone left any blank, you can select* '*pause*' *for that statement—because that is what you did. What did you learn about yourself and the way you initially respond to change while doing this exercise? How many of you ended up with more* '*pause*' *than* '*pounce*' *responses? How many of you ended up with more* '*pounce*' *than* '*pause*' *responses?*"

"*Your initial response does not imply your capacity to be a change agent; what it does indicate is what you need to be on board. Understanding the way you*'*re wired can help you understand the contribution you can have when you*'*re optimizing the way you*'*re naturally designed.*"

Reflection

As you observed from the initial exercise, not everyone responds to change the same way. Some people naturally pursue it; others accept it as a fact of life; still others avoid it as much as possible. Therefore, a one-size-fits-all approach to change management on your team will always yield mixed results. Once you have a feel for the basic knee-jerk responses that your team members have when they encounter change, you can reframe your change management strategy with your team's needs in mind.

As a leader, you can adapt how you engage with the team, to increase their agility as you adapt together and adjust with the fluctuating urgency of decision making. While reflecting on the results of the exercise, leaders proceed through three steps to help them optimize their team's unique change management chemistry of "Pausers" and "Pouncers."

Step 1. Identify the change. Think of a change that is going to impact your team in one way or another, and write it down. Be as specific as you can—think of the elements that make this change significant.

Step 2. Identify your Pouncers and Pausers. Write down the members of your team who are inherently Pouncers, the people who have demonstrated themselves (in the exercise and in life) to be predisposed to spontaneously and enthusiastically jump at any opportunity to change, explore, experiment, or stretch. Take a look at the elements that make this change significant. If these people are naturally charged up by change, how do you anticipate they will be impacted by each of the listed elements of your identified change? Now write down the members of your team who are inherently Pausers, the people who have demonstrated themselves (in the exercise and in life) to be predisposed to initially taking a step back and asking important questions to make sure any decision is made mindfully and circumspectly. They may also have a keener awareness of what will be lost in the change. Don't mistake their need to pause for an unwillingness to change; they just need time to process in order to get on board. Once on board, they can be some of your strongest change agents. How do you anticipate they will be impacted by each of the listed elements of your identified change?

Step 3. Rank the urgency and significance of the change you're thinking of making. Leadership consultant Rory Vaden describes urgency[26] as "how soon it will matter," and significance as "how long it will matter." Based on these two issues, here are some guidelines as you begin to adapt your leadership

26 See *Procrastinate on Purpose: 5 Permissions to Multiply Your Time*. New York, NY: Perigree/Penguin Random House.

approach to the needs of your unique team of Pausers and Pouncers.

Decisive-Inclusive (a high urgency, high significance change)

In this type of change, timing is critical. You will need to make swift decisions.

- Your initial focus can be to form a core team of Pouncers to brainstorm implementation and logistical decisions, and to build momentum and excitement.
- Your next phase of change management will be to bring in the Pausers and inform them of the decision(s). Provide as much information as you can—and make space for them to process any fear and grief of what they lost, either in the process (due to the necessary speed) or the end result. Honor it without framing it as "negativity." Ensure them that they have a place, an equally important role, once the changes are implemented.
- Once the change has been fully implemented, you can call upon the Pausers to take the lead, to establish stability, clarity, and risk mitigation. Their questions will be able to help fine-tune what couldn't be implemented initially.

Inclusive-Decisive (a moderate urgency, moderate significance change)

In this type of change requires decisions within a reasonable time-frame, but the investment of time for front-end engagement prior to making the decision will help significantly with buy-in and sustainability on the back-end.

- Your initial focus can be to provide a set amount of time for discussion of the change with all members of the team, explaining that the discussion is to get everyone up to speed. Provide everyone with as much information as you can during that set time. Though the decision will be made with people who can move quickly, make time to answer as many questions from the Pausers as you can beforehand. Make clear that the Pausers will spearhead efforts of stabilizing and fine-tuning once the initial implementation has been made.
- Then work with a core team of Pouncers to brainstorm implementation and logistical decisions, and to build momentum and excitement.
- After the implementation plan has been made, re-engage with everyone, and update the Pausers on the decision(s), providing as much information as you can. Make space for the Pausers to process any fear and grief of what they are losing. Honor it without framing it as "negativity."
- Once the change has been fully implemented, focus can shift to the Pausers who naturally establish stability and clarity, and mitigate risks. Their questions will be able to help fine-tune what couldn't be implemented initially. Pouncers make room for Pausers to build legacy and stabilize the system.

Participatory-Inclusive (a low-moderate urgency, moderate-high significance change)

In this type of change, buy-in is at least as important as the change itself. Sustainability of the idea is as important as its brilliance. You need the combined voices of the Pouncers and the Pausers to implement the change with finesse. Take the time necessary to allow everyone to participate in every stage of the process. You are surrounded by people who believe that they matter—because they do! If you have the time, make the space.

- Your initial focus is to bring together both the Pausers and the Pouncers to brainstorm implementation and logistical decisions, to discuss risks and concerns. Once the decisions have been made, make room for both sides to express and process what they're feeling, from grief, fear, and loss, to hope, momentum, and excitement.
- At each phase of implementation, include all members and provide as much information as you can. Set aside space at each stage of the change for members to process anything from hope and excitement to fear and grief. Honor both perspectives as you move through the process, ensuring each member that they have a place, an equally important role, at each stage and once the changes are implemented.
- Once the change has been fully implemented, though everyone will be invited to assist, Pausers will likely be more confident to take the lead in establishing the stability, filling in the details, providing clarity, and mitigating risk. Their questions will be able to help fine-tune what couldn't be implemented initially.

This exercise requires leaders to shift their thinking about change management and adaptability work. It abandons the traditional "formula approach" and instead envisions the work as an investment in human agility that begins with understanding and honoring the way each person is designed. This exercise helps leaders get their teams one step closer to that end.

Dr. MaryJo Burchard, co-founder of LDR21 and developer of the Initial Response Index and Open Index, specializes in research and consulting that empowers people in times of change. She facilitates leadership training and organizational development for the City of Virginia Beach and teaches Organizational Behavior part-time to graduate students at Regent University's School of Business and Leadership.

Unit 4: Collaboration

Introduction: What is collaboration?

Author P.. Byline

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Collaboration at the core of professional development

Mark Krake

CASE STUDY

Organization: metasfresh

Employees:

Industry: Enterprise resource planning

Challenge: Train leaders to work like open source community members

If you're launching a company, you might believe you shouldn't have to deal with issues like personnel development and company culture. After all, as a startup you're only concerned with the development and rapid evolution of your own product and services, right?

This kind of thinking is *short-term* thinking. Successful startups develop organizations with long-term strategies in mind. Startups really should think about—and prepare the groundwork for—their own company culture from beginning, so they can scale it over time as they grow.

That's what we should have done.

As former IT managers, project managers and software developers, we founded our company in 2004 and started developing business intelligence solutions and open source ERP software, initially with Compiere[27] and later with ADempiere[28] and metasfresh[29]. We had few people and many tasks to perform. If we didn't have the know-how we needed to do a particular job well, then we taught ourselves enough to muddle through. For us, it felt like Kaizen: doing a lot of small steps, but moving and improving continuously.

As with many young companies, we didn't think much about whether this was the right way to do things; we were completely focused on what needed to be done and solved problems as fast as we could. This way of working was obvious to us. It felt natural. In fact, because our product is open source, we were able to transfer knowledge and experience we gained from open source projects directly into our organization and our style of working.

But like all startups, we eventually needed to hire more people to help our organization grow. And that meant scaling our fast-paced, open, and collaborative culture to new colleagues. How were we going to do that?

We did it by developing our own open leadership training program, which has four key dimensions. I'd like to share them.

Everyone is fit for leadership

When we at metasfresh reached the point where we wanted to hire our first employees, we had to ask ourselves: What should these employees be able to do, and who should support them?

Our answer: "Everything, and everybody."

27 https://en.wikipedia.org/wiki/Compiere

28 http://adempiere.net/web/guest/welcome

29 http://metasfresh.com/en/

We decided that our new colleagues should not only be employees; they should also be community members. We wanted them to be able to do what we'd been doing at that time—perhaps even better than we had. We knew immediately that finding such perfect fits would be difficult, so we decided to search for people with some needed technical skills and a great team spirit. But we also thought hard about how we could describe our way of working and therefore allow our new colleagues to transform into efficient team members quickly.

I recalled a former employer, Bonndata, an IT service provider for a large insurance company called "Deutscher Herold." That company utilized a personnel development program called "Fit4Leadership." The core focus of the program was preparing the company's *own employees* (almost exclusively COBOL Software Developers and Mainframe specialists) for future challenges in their fast-changing worlds. An essential part of Fit4Leadership was an annual interview, which the heads of various departments held together with employees.

A questionnaire helped everyone prepare for that interview. All parties involved used it to exchange feedback on professional and social developments through a dialogic practice. It was not only about the *supervisor's* perception of the *employee*, but also *the other way around*.

This was what we needed for the foundation of our own training. We extracted a few additional elements, too, but kept the name "Fit4Leadership" because it expressed exactly what we wanted to achieve with our own program: allowing everybody to reach for leadership in their respective areas.

Over time and through our work on the program, we found the following four cornerstones that are currently the foundation of our organizational culture. So we designed our own Fit4Leaderhip program to help us make these values sustainable—in the *long term*.

1. Competence wheels

We use three "competence wheels" to define general targets for personal development within our company. The competence wheels are divided into:

- Technical know-how (e.g., Java, SQL, ReactJS, Redux, Jasperreports and more)
- Functional know-how (e.g., inventory management, commission, logistics, accounting and more)
- Soft skills (e.g., self-responsibility, quality consciousness, solution orientation and more)

We then divide each competency into three skill levels: connoisseur, adept, and expert. The know-how we describe in each of the competence wheels includes the knowledge and skills required to carry out our work in our company. In doing so, we do not make a distinction between different roles. Every team member decides on their own how to develop and fill a competence wheel—either very focused on reaching the expert status within one area, or on broader development in all areas.

We adapt the contents of the competence wheels to the current needs of our team and company once a year as part of the personal annual discussions. The acquired skill level is proposed by the individual team member as well as the team. The result is a wonderful balance between self-perception and perception from the team, a fairer classification everyone can accept.

2. Shared responsibility for culture

In our organization, *all team members participate in and are responsible for the development of our internal company culture and people development program*.

This is really a no-brainer for us, because it's exactly what we learn through our daily collaboration in open source environments. When people experience the possibility of engaging in a topic and receive the feedback that their engagement is appreciated, their motivation to collaborate even further increases.

What's more, we invite all team members to try new things and take risks in doing so. Failure is a fundamental part of our professional development. We provide a secure environment that allows such developments—and also possibilities for communicating about the outcomes, so all can learn from them.

This approach is not only valid for technical developments but also explicitly wanted for our organizational workflows. All team members should participate actively in the development of the way we work and have the chance to receive and give feedback frequently.

3. Minimize overhead

All the skills we include in our competence wheels match what the team needs to do its work and collaborate efficiently. So we incorporate all opportunities to improve the own competences in our daily work. People new to our company often need time to fully understand that they're not reporting to a single boss, but to an entire team. This kind of peer accountability actually speeds up our work by minimizing overhead.

We all maintain a backlog of prioritized Issues. Team members can decide which issues their personal knowledge and skillset best equip them to handle. We invite everybody to not only take issues in their comfort zones but also take issues that are above their current capabilities.

In the process of solving issues, all of us have the responsibility to achieve the knowledge we need for doing the work. When you don't know something, you ask a teammate. And if someone asks *you* for help with an issue, then you can take that as an indication that your own professional development is on the right track.

That's one reason why we see our company culture, including the way we tackle issues as part of our daily work, tightly connected to our people development program. For us, both belong together—two sides of the same coin. This makes our personal development effective because work, control, and feedback rest on the shoulders of all team members.

4. Always share knowledge

In open source communities, there may be situations in which individuals can not distinguish themselves despite their good performance and participation. This can lead to situations where important knowledge exists in the community but only remains with *one* individual and therefore does not add value to *everyone's* work in the long run.

We solve this with mandatory daily standups involving all team members in video conferencing. We use these opportunities to get to know all members quickly and continuously and to offer a platform on which everyone can present themselves in a defined framework. The agenda for the daily meeting is timely and thematic, and all participants (not only the moderator) discuss and agree on it. The daily standup ensures that much information is distributed in the shortest possible time. There are often topics for which members then agree for a follow-up exchange and thus promote an efficient spread of ideas and knowledge.

These routines play an important role in giving the members a secure environment to express their ideas and also taking the risks of failure. In our work environment, failures are part of a natural development and they are experienced without the loss of trust in our team.

Conclusion

These basics accompany and guide us to this day, even as we are in a process of constant change and improvement. They form the cornerstones of the development in our company as well as our open source community metasfresh. We continue to travel on our Fit4Leadership path, and have learned a lot over the past 13 years. The beautiful and exciting thing for us is that this path will never end.

Mark Krake is a requirements engineer, software developer, and co-founder at metasfresh, an open source enterprise planning software company.

Review and discussion questions

- Mark writes that organizations "really should think about—and prepare the groundwork for—their own company culture from beginning, so they can scale it over time as they grow." Has your organization done an adequate job of this? Why or why not?

- Of all the lessons metasfresh learned from open source communities, which do you think is the most important? Why?

- "Failure is a fundamental part of our professional development," Mark writes. "We provide a secure environment that allows such developments—and also possibilities for communicating about the outcomes, so all can learn from them." Can you say the same about your organization? Why or why not?

Encouraging collaboration when it isn't easy

Angela Robertson

CASE STUDY

Organization: Microsoft technical content team

Employees:

Industry:

Challenge:

I manage a technical content team as a part of the Cloud and Enterprise group at Microsoft. And about fourteen months ago, the team was experiencing some serious communication and collaboration issues.

A lack of openness was at the root of them.

This is the story of how my team rediscovered its purpose, found new success through collaboration, and engaged with external contributors and customers in new and productive ways—all thanks to an open approach.

Collaboration conundrum

At Microsoft, technical content teams work as part of a larger engineering team to document products available for download. Like other software companies and organizations, we market products aimed at delivering certain business value.

Technical content teams, then, must clearly explain *how* to use software to efficiently do what we've told a customer is possible.

We do this primarily through written documentation. Over time, minor updates to that technical content are insufficient. So we, as technical communicators, must continually evaluate what customers need to do, compare that information against what we know the product can do, and explain how to use the product so customers will be successful and will want to return to the product going forward. This kind of work can require major documentation overhauls frequently.

My team knew this. But too often I observed some team members merely *tinkering with* very minor updates—changing one or two words, and simply copying and pasting updates from technical experts. The work reflected a lack of willingness to *frame a point of view* regarding what customers should do with the products we're documenting.

On top of that, everyone was operating as an independent contractor inside a silo of work that they were pretty conscious of protecting. The team had recently moved content from a closed system to GitHub—but was still only paying lip service to the idea that writers would accept contributions from anyone, anywhere. In practice, the team members took great ownership of the content that they'd "authored."

I knew our team culture and behavior had to change. We needed to accept contributions from anyone willing to take the time contribute. We needed to consider a workflow for evaluating contributions and create a community that encouraged contributions. We also had to start working more collaboratively internally.

To do *any* of this effectively, I knew I needed to help the team rediscover its purpose.

Finding purpose in openness

Our shared purpose became demonstrating a commitment to openness. In our case, "openness" meant that we accepted contributions through an easy-to-learn markdown file format, evangelized for contributions from internal and external contributors, and allowed our internal comments to be visible to an external audience. It also meant that people had to be open to feedback from others.

Transitioning from XML to markdown meant that the workflow changed for everyone on the team. We replaced our proprietary file management system with GitHub, so checking for internal and external pull requests became a new task everyone now undertook. Becoming more expert with git took time; the team was straining to adjust when everything felt so new.

As people were stressed by the content publishing workflow changes, collaborating with stakeholders was also strained. Because people now had less time to do their work, they didn't invest as much in content *quality*. "Isn't the community available to help with contributions?" a few people asked when they spoke up about quality issues. But management changes and other factors caused these voices to get muffled and silenced.

But the the workflow changes required when moving from XML to markdown, and from proprietary file management system to GitHub, were *much easier* to manage than the *cultural* changes required to make the team more open to feedback about the content that we were publishing.

Taking an honest look

For too long, the technical content team hadn't taken an honest look at what was working well and what needed improvement. The pervasive belief was that being critical meant being unkind. But a few long-time team members managed to provide constructive feedback in a way that cracked open the door to a more open team culture.

Seeing the opportunity, I began providing more feedback too: I started to use different words to describe our work. Content developers were no longer authors; they were *maintainers*. Responsibilities expanded to include *reviewing contributions*, and *contributions* came via GitHub. Experience with git was expected to grow over time. We all laughed about our experiences in *git hell*.

As a manager, I didn't send email with requested changes. I posted comments and pushed commits. I tagged others to take a look at contributions. I shared positive feedback with people who took risks, regardless of the outcome. I changed teammates' assignments until I saw that the person's work aligned with their potential for growth. I worked in the community as much as possible to encourage contributions.

What happened led to an organizational change that continues to surprise and instruct.

A new approach to refactoring

In a period of only ten months, five people left a team that originally consisted of 10. One person decided to retire. Another person left for a different role in the company. Three people left because of (as I understand it) the cultural shift to openness.

Employee turnover at a tech company based in Seattle is not unusual. That said, when half the team departs, you, as a manager and leader, have an opportunity to reshape the organization in a way that is impactful for customers and the employees who remain with the team. You also think about who stays with the team and how to retain the talent you want to keep. I knew we could do this by doubling down on our commitment to openness.

Finding employees to join a team takes time. The smaller team that remained after each departure banded together to do what we needed to do for our customers. Yes, we made mistakes as we worked to bridge any gaps while also learning how to demonstrate an external commitment to openness. But to make contribution and collaboration easier, we changed the structure of the documentation set stored in GitHub. These changes took months to implement, as we made the changes alongside ongoing updates and the refactoring of content.

When a team decides to refactor content—that is, revise and rewrite it to improve clarity without negatively impacting technical accuracy—it has no guarantee that the refactoring is going to be as successful the team predicts. For example, years ago I worked on a team that spent 18 months refactoring content based on significant customer research. When the changes went live, despite the careful research and planning, customers were unhappy and my team had to undo changes based on clear indications that the changes were leading to large, sustained dissatisfaction with the product.

So as my current team refactored content, instead of making big, bold changes behind the scenes, we pushed smaller, *iterative* changes when we had smaller batches of new content ready to deliver. If you were to look at the daily updates we made, you'd see only changes that seem minor and small. But over a six-month period, the sum of those "small" changes added up to a substantial amount of quality improvement. One potential downside of taking this kind of iterative, daily approach is the possibility that you'll learn something later on in the process that forces you to rethink an earlier change. Yet this type of "why didn't we wait?" moment did not occur. By making updates in bite-sized chunks, we found it easier to recover when things did not go as planned.

For instance, in our first update, when we pushed the changes live, all of our content went offline. Our service level agreement (SLA) says we'll be online 100% of the time unless we pre-announce a maintenance window. Going offline is a *big deal*. We quickly realized a configuration setting was the root cause of the outage. Forty-five minutes later, we were back online. That said, for 45 minutes our content was offline—and customers noticed. Instead of posting an excuse, my team owned up to the fact that, in the process of making an improvement, we had encountered an unforeseen problem and worked to fix it as soon as possible. The team survived.

About a month later, when a long-time, trusted contributor recommended a change, I merged the commit without completing due diligence regarding verification. Within a day I realized the usually trustworthy contributor submitted bad information, and I pushed a correction. The readers noticed the changes and felt we had not done an adequate job of explaining the changes. A Reddit thread about the issue soon appeared, and there was a lot of interesting internal and external discussion for about 48 hours. I was OK.

These types of situations continue to teach us things about making updates to the technical content.

Staying the (open) course

However, one of the more interesting discussions that occurred wasn't related to content at all, but rather to the updates customers could read on GitHub. Specifically, commit messages from internal contributors started to display in Bing search results. The team felt like their private messages were becoming public. We talked about whether we should find a way to suppress certain information from being shared externally.

At the end of the discussion, we opted to remain open.

These now-public snippets illustrate things we experienced as a team. As I managed the team, I made more mistakes. But through it all, I learned the following lessons:

1. I remained committed to providing constructive feedback to people unaccustomed to anything that might be perceived as negative. Some people responded positively and appreciated my input. Others felt like I was off-base. Some people were quiet, but I could see a change in their actions that led me to understand they had heard me.
2. I asked *for* feedback—and listened when I received it. Someone told that care too much about people and that keeping a little distance might help me have more regular work hours. During the day I tend to spend most of the time talking with people. I find that in email and online chats, people can miscommunicate. Talking to people, in person or using audio- or video-conference, reduces miscommunications and leads to an increase in productivity and employee engagement. People on my team had relied on email for so long that the idea that I would spend time *talking* with people regularly was unexpected. I worried that I was taking too much time away from "productive work," so I initially hesitated to talk with people in person. But I then remembered that the best teams I have worked with spent

more time communicating verbally and in person —not just online.

3. In terms of management style and approach, I learned to be a *partner* and *facilitator*. When teams are under a lot of pressure, there is a tendency (as a manager) to micro-manage. I do not like to be micromanaged, so I resist the urge to employ that management style. The team members who stayed with me—and those team members who joined as others departed—started to become a team that trusted each other.

The commitment to open meant that we (internally and externally) listened to others, but it was not our responsibility for everyone to be happy with the final outcome. I remembered that an open organization is not an organization that relies too heavily on consensus. The emphasis in an open organization is on *collaboration*.

After more than 14 months, the team is changing. Yes, half of the original team has departed. But the new team members are not the only change. Original members who remain with the team are now more likely to express themselves freely and laugh at mistakes. I can ask questions that at the beginning of this experience would have resulted in silence. Today those questions more often lead to vibrant discussions. People are willing to take risks because they trust that we learn when we make mistakes. We work through problems in small groups and share what we believe our customers need. There are fewer silos as people are leaning into the notion of *sharing their work* and not being afraid of being torn apart. We build each other up and open ourselves to a community of contributors, who care about the content we publish.

Angela Robertson works as a senior content manager at Microsoft.

Review and discussion questions

- Angela notes that her team needed to take "an honest look" at itself before it was able to change its operating culture. Is your team honest about its culture, function, and capabilities? How can you help your team see itself clearly and honestly?

- A few of Angela's team members departed the organization because they resisted the shift to a more open and collaborative culture. How would you handle a similar situation? What might you say to colleagues skeptical of an open approach?

- Angela writes that leading openly required her to think of herself as "a partner and facilitator." What do you think this shift in management style requires? Is that leadership style appealing to you? Why or why not?

A seven-step plan for engaging Mr. Grumpy

Rebecca Fernandez

> EXERCISE
>
> Estimated time to complete:
>
> Materials needed:
>
> Activity type: Action

When you practice open communication and invite feedback, you get a lot valuable input that can improve your ideas, projects, and decisions. Yet one of the most common questions I hear is this: "That's all well and good, and I agree, it's best to open yourself up to that kind of feedback. But what about that one guy. . .?"

You know the one they're talking about. It's Mr. Grumpy, who inevitably shows up and says things like, "Oh, that won't work here" or "We already tried something like that," yet never seems to offer any helpful or productive alternatives.

Don't be fooled by Mr. Grumpy's name. Mr. Grumpy can be a man or a woman, and sometimes her demeanor is more skeptical than argumentative. But whatever form your Mr. Grumpy takes, you know who I'm talking about, and I've pulled together seven steps to help you engage Mr. Grumpy in a productive dialog.

1. Assume positive intentions (it always helps)

Mr. Grumpy doesn't make this easy, because the kinds of comments and feedback you'll hear from him sure don't *sound* like they are being delivered with good intentions.

Yet once you get to know Mr. Grumpy, you will find that because of his behavior, he is well accustomed to being treated as if he's bringing everyone down. You can surprise him by making a deliberate choice to assume that he's trying to be helpful.

Use your imagination during this step. Challenge yourself to think of a positive reason why someone might say what Mr. Grumpy is saying in that moment. After all, each and every one of us has the potential to become Mr. Grumpy, if the conditions are ripe for it. Some common positive intentions that you can attribute to Mr. Grumpy include:

- Wants to prevent someone (or everyone) from wasting time on something that won't pan out
- Wants to prevent a problem
- Wants to limit how much risk the team takes on
- Sees a flaw in the plan and has difficulty finding the right words to explain it to others

Speak that intention out loud. Say something like, "*It sounds like you are worried that we will break something that's working well today, and not get enough value from these changes to justify that. Is that about right?*"

Even if you guess wrong, Mr. Grumpy will correct you, saying something like, "*No, it's not that. It's that we've tried things like this before, and it seems like we're headed down the same path again.*"

In the process, even if Mr. Grumpy didn't enter the conversation with positive intentions, he will latch onto that positive intention to explain his own poor behavior. This, in turn, will lead him to be more productive in the conversation.

2. Seek first to understand, then to be understood

After you've helped Mr. Grumpy find her positive intention in the conversation, it's time to start asking questions about her perspective. Often, we make the mistake of assuming that we know what Mr. Grumpy is going to say, along with her reasons behind it. Pay attention to the moment when you are inclined to explain your own perspective or reasoning, and tell yourself to hold off. Ask more questions first.

When you've asked enough questions that you can rephrase Mr. Grumpy's concerns in your own words, and she confirms that you understand, that's the best time to offer your own perspective and reasoning.

3. Openly acknowledge limitations and risks

Often, Mr. Grumpy will hone in on a limitation or risk that you've already accounted for. When that happens, it's easy to be dismissive of Mr. Grumpy's concerns. Instead, try openly acknowledging that limitation or risk. Go ahead and share other ones that Mr. Grumpy hasn't brought up, as well. Write them down, on a whiteboard or in your notes, so that Mr. Grumpy sees you are listening to him. Explain what you're doing to account for that issue, and also be transparent about the fact that you don't have all the answers. Invite Mr. Grumpy's perspective on the issue.

4. Voice your fears

Conversations with Mr. Grumpy are uncomfortable in part because she often brings our own fears to the surface. Be willing to make yourself vulnerable, and share what's on your mind. You might say, "*You know, when you bring up that risk, it scares me a bit because I know it's something we can't fully account* *for. . ." or "I'll admit, I'm worried that I won't be able to get the support I need to make this successful.*"

Mr. Grumpy will be taken aback, because she is so used to playing a different role in these conversations. When you voice your fears to Mr. Grumpy, and she sees that you don't have all the answers, you will often find that she shifts her behavior, as well, and responds by wanting to make the project more successful.

5. Offer a productive role

By now, you may have some ideas for a productive role that Mr. Grumpy can play in your project. Mr. Grumpy's default role tends to be overusing his strengths and turning them into weaknesses. Yet those same capabilities can make him an asset, if applied in a more productive manner.

For example, if Mr. Grumpy is one who pokes holes in every idea, he's a detail-oriented thinker who might be an excellent helper when you need quality or user testing later in the project. Compliment his attention to detail, and ask if he'd be interested in contributing in this way when the opportunity is available.

If Mr. Grumpy is the guy who speaks up on behalf of the Watercooler Complaint Association, he has the potential to be a trusted liaison between the project team and other stakeholder groups, helping all sides understand each other's concerns and serving as a fact checker for both.

A good way to close the conversation is to say something like, "*Say, I could really use someone who . . . I know it's a lot to ask, but is that something you might be willing to take on? Don't feel rushed to give me an answer.*"

6. Let Mr. Grumpy have the last word

Sometimes, despite applying all of the previous steps, Mr. Grumpy just won't be ready to let go of something in a conversation. And that's okay. Be willing to let Mr. Grumpy have the last word, and to leave things at, "*Well, I can't say that you've changed my mind, but you have given me a lot to think about. Thank you for that.*"

7. Stay in touch

It's important to keep Mr. Grumpy informed about the project, and to continue to have conversations. In the future, you might be able to bring Mr. Grumpy's requirements back into the project, or her requirements might evolve to better fit the direction of your efforts. But the only way that can happen is if you make an effort to check in, every so often, and let Mr. Grumpy know how things are going.

Something surprising often happens in these conversations. By the end, you come to appreciate Mr. Grumpy's divergent viewpoint, and Mr. Grumpy values working with someone who listens to her perspective, even if you don't change every detail to her liking.

As you prepare to leave the conversation with Mr. Grumpy, find an authentic way to express your desire to stay in touch. You might say something like, "*I've really learned a lot from our discussion today, and I hope that we can continue to stay in touch. Would it be alright if I reached out from time to time, to give you an update on where things are headed, and get your thoughts?*"

When I've applied these steps in my own conversations, I've find that they don't just change Mr. Grumpy for the better. They also change my attitude toward Mr. Grumpy, which in turn, helps us build a valuable partnership that leads to better outcomes for everyone.

Rebecca Fernandez is a Principal Program Manager at Red Hat, leading projects to help the company scale its open culture. She's an Open Organization Ambassador, contributed to The Open Organization book, and maintains the Open Decision Framework.

Performing the collaborative dilemma

Gina Likins

EXERCISE

Estimated time to complete: 30–60 minutes

Materials needed: Two varieties of prizes, a set of "choice cards" for every participant, a whiteboard and markers, signs that read "30 seconds" and "20 seconds"

Activity type: Action

I wanted groups to experience open source values in a very concrete, hands-on way—so I created a game called "Candy or Swag,"[30] which is based on The Prisoner's Dilemma.[31] Unlike The Prisoner's Dilemma, however, Candy or Swag tests a negotiation scenario based on reward (rather than punishment) and uses real, tangible prizes of varying value to demonstrate how

30 Adapted from "Teaching the Prisoner's Dilemma More Effectively: Engaging the participants," by Michael A. McPherson and Michael L. Nieswiadomy (http://www.cas.unt.edu/~mcpherson/papers/mcpherson_nieswiadomy_jee.pdf)

31 The Prisoner's Dilemma (http://www.investopedia.com/terms/p/prisoners-dilemma.asp) is a classic exercise in game theory that explores the "competing" desires of cooperation and self-preservation. I've always been fascinated by game theory and the Prisoner's Dilemma, but when I tried to explain it to others, I found it was hard to explain – and to understand—because it was abstract: set in the realm of "thought experiment."

collaboration and transparency can form the basis of a sound business strategy.

In this chapter, I'll explain how I run "Candy or Swag," including game setup, instructions for play, and hints for facilitation.

Phase 1: Preparation

STEP 1. Gather materials. For this exercise, you will need four things:

- *Prizes of two different varieties: "candy" and "swag."* Candy (or "low value" prizes) can be anything with trivial value, like individually wrapped pieces of candy (my typical choice), pennies, or stickers. To estimate quantity, assume that every participant can win a piece of swag every "round" and that you will run at least eight rounds. Swag (or "high value" prizes) don't have to be physical objects; it could be "two hours off," for example—but there should be a physical representation of the prize, like a coupon (I've used company-branded items that we usually give away at conferences). To estimate quantity, figure that every participant every participant can have one piece of "swag" and have a few to spare.
- *A "choice card" for each participant*. On each card, write the name of the "low value" prize on one side, and on the reverse write the "high value" prize. I tend to use candy for the former and swag for the latter (hence the name of the exercise), but you should use whatever works best for you. Throughout this chapter, I'll use the terms "candy"

and "swag" as placeholders for these two types of prizes.

- *A whiteboard and whiteboard markers or printed sheets to distribute with the payoff matrix* (see Figure 1).
- Signs (handwritten is fine) reading "30 seconds" and "20 seconds."

STEP 2. Place a choice card at each participant's desk.

Phase 2: Game Play

STEP 1. Explain the rules to participants. Here they are:

1. *No talking from this point forward. Anyone who talks gets neither candy nor swag.*
2. *You have a choice card in front of you. When I say so, pick up the card and hold it so that your choice (of candy or swag) is facing up and the other side is hidden by your hand.*
3. *I'll come around and tally your choices, so make sure to hold your card so I can see it but no one else can. If you want "candy," for example, hold the card so I can see "candy" when I come around.*
4. *Here's the twist: Whether you receive candy, swag—or nothing at all!—is based on what choices the whole group makes, based on a payoff matrix.*
5. *Here's how the payout works. Pay close attention.*

STEP 2. Explain the "Payout Matrix." I find that constructing the payoff matrix in real-time on the whiteboard (while talking it through) works best. This seems to help participants better understand the choices.

If using a whiteboard is not feasible, you can distribute printed copies of the payoff matrix. The payoff matrix is based on a "target number" of participants, which is the maximum number that can choose "swag" and ensure a scenario where everyone gets something. I usually set the number at roughly 1/10 the size of the group. For example: In a group of 20, the target number is 2, while for a group of 8, the target is 1 (as it's hard to have less than a whole person). For a group of 15, I'd use 2 as the target.

If...	Who gets CANDY	Who gets SWAG
... **everyone** chooses **candy**	**Everyone**	**No one**
... ≤ target# of participants choose **swag**	**Everyone except** the participants who chose **swag**	The participants who chose s**wag**
... > target# of participants choose **swag**	**No one**	**No one**

Figure 1.

After explaining the payout matrix and taking questions, you're ready to play! (Important: Do not tell the participants how many rounds you're playing.)

Step 3. Ask the participants to choose candy or swag by holding their choice card so that you can see their choice (but no one else can).

Step 4. Count the number of participants who chose swag.

Step 5. Tell the group how many people chose swag (but not who chose swag). Explain what everyone won (if anything) using the payout matrix above, and hand out prizes.

Step 6. Run a few rounds (at least three) like this, then ask for some reflection about what the participants are noticing.

Step 7. By now the participants are usually getting a little frustrated (which is fine), so explain: "*We are going to try playing the game a little differently—in a way that's more 'open.*'"

Step 8. Review the Open Organization Definition (see Appendix) and ask the group if they think it might help if they were allowed to collaborate a little before making their decision for candy or swag. Assuming they jump on this opportunity (and I've never seen a group that hasn't), you can explain some new rules.

Step 8. Explain these new rules:

1. *You will have one minute from when I say "go" to collaborate as a group before each of you again chooses candy or swag.*
2. *I'll hold up signs telling you when you have 30 seconds left, then 20 seconds left, then count down the last ten.*
3. *All the rest of the rules are the same. Remember to choose the card for the prize you want, then hold it so that I am the only person who can see your choice.*

Step 9. Say "*Go.*"

Step 10. At 30 seconds, hold up the "30 second" card. Then, at 20 seconds, hold up the "20 second" card. At 10 seconds, begin a silent countdown using your hands held high above your head. (Note: I'm not incredibly strict with the timing. If there was clear progress, I let the time run long, for example. This step is primarily a way to ensure participants know there's not room for endless debate.)

Step 11. As above, tally the votes for swag and explain the "payout." If at any time a participant asks how many more rounds there will be, tell them that you don't know. Run at least three rounds his way. Run more rounds if it takes them a while to get collaborating.

Step 12. After a couple of rounds of playing the game this way, ask the group if—based on your discussions about "openness"—anyone can think of a change that would make the process even more open.

Step 13. If the group has had people who said they'd choose candy but really chose swag in the collaboration period (what we might call "cheaters"), they'll usually come up with "transparency" on their own. Even if you haven't seen cheaters so far, though, consider proposing a hypothetical situation asking what would have happened if the group still ended up with too many swag choices and how that would have affected the outcome. (I will often use this opportunity to talk about the open source idea of "trust then verify"—or collaborating with people to find the best solution, rather than competing, but having the code be open and transparent to everyone so it's "checkable.")

Step 14. Change the rules one more time. Now have the participants make their choices in an "open" or transparent way (for example, by placing their choice card face up on the table). This variant is especially helpful if you have groups that are unable to figure out how to effectively manage the collaboration variant of the rules.

Reflection

If your exercise runs anything like mine have, then during the first few rounds of the game more than the target number of participants will choose swag and no one will receive anything. In groups I've facilitated (which typically had about 20 participants with a target number of 2), the number of participants who chose swag each round ranged from four to eight, but it was never fewer than two (so no one won anything). When asked to reflect on what they're seeing, the participants typically identify a few issues:

- "A lot of people are greedy (i.e., want swag)."
- "There's no way to tell who is asking for what."
- "There were a lot of people who were trying to do the right thing so everyone could get candy at least."

After I've changed the rules to allow for more collaboration, however, the participants immediately figure out that if they work together they can *all* get candy every round, and they can *take turns* getting swag. Watching the discussions between the participants evolve is fascinating: even though I've just met these participants, I can tell who the leaders are. I've seen groups came up with their own variants of a "sharing protocol." For example, one group chose one person from each table in the first round, then the next person from each table during the next round, while in another group they just moved around the room clockwise. When we enter the reflection phase of the exercise, almost every group I've worked with has observed that they have fared better when everyone was collaborating.

One group was particularly illustrative. Apparently, there'd been some interpersonal drama earlier in the week and tensions in the group were high. When they first played the collaboration round, they came up with a plan—but someone "cheated"[32] (i.e., didn't stick to the agreed upon plan) and ended up causing the swag count to be "3."

So we tried it again, and the same thing happened. And again. By this point, the group had figured out who the rogue was (and he'd accumulated three pieces of swag while others had none) and were beginning to be quite upset with him. To my utter surprise, on the next round the cheater didn't cheat. I had

32 I have "cheated" in quotes because in one sense he was following the best possible plan, if you were to discount altruism as a means to obtain future good.

to laugh, though, when someone pointed out that one of the other participants had taken away his swag card!

The cheater was understandably frustrated, but I used this as an opportunity to talk about what happens in open source communities when people show they are not trustworthy or that they don't have the community's best interests at heart. As I explained to the group, in open communities, if someone is consistently causing problems, the community will attempt to work it out with that person. But if that doesn't work, the community will often have no choice but to remove that person from the community.

The open organization values of collaboration and transparency seem like they should be easy enough to understand. But giving people the opportunity to discover how well they work through experimentation has proven far more effective than all the explaining I could do. This exercise is one way to provide that opportunity.

Gina Likins is a member of the University Outreach group, which is part of the Open Source & Standards Team at Red Hat. She's been working in internet strategy for more than 20 years, participating in online communities for nearly 25, and working in open source for more than four. She's passionate about finding ways to help our open source communities thrive and be more welcoming for everyone.

Unit 5: Community

Introduction: What is community?

Author P.. Byline

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Case study

Author P. Byline

CASE STUDY
Organization:
Employees:
Industry:
Challenge:

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Review and discussion questions

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Building community to stay on the cutting edge

Jen Kelchner

CASE STUDY

Organization: Slalom

Employees: 4,500

Industry: Management Consulting

Challenge: Scaling a culture of openness as the organization grows

Slalom[33] "does open" in a fascinating way. Aaron Atkins and Shannon Heydt, who both work in talent acquisition for Slalom, sat down with me to share challenges related to scalability—and explain how recruiting and talent management play a strong part in shaping company growth.

Slalom's case is rich and illustrative. But to understand it, we must first understand scalability. Scalability is the ability of something to adapt to increasing demands. Meeting your business demands starts with your people and frameworks far before you fulfill a service or product. Scaling is also quite challenging. It can involve (literally) years of doing the hard work with a slower growth pattern and seemingly overnight an explosion of growth occurs to meet your business demands.

33 https://www.slalom.com/

When this explosion occurs, workflows suddenly become inefficient. Talent management struggles to keep up with on-boarding, retention, coaching, development, staffing appropriately, and so on. What worked *last* quarter will no longer support the ecosystem you're facing *today*.

Scaling in the open

In open organizations, scaling requires a strong identity; successful scaling relies on who you are to carry you and your people through times of intense growth. I'm talking about your core ideas and values. And I don't mean the wall art in the break room with the really cool font that reiterates your value statement.

Instead, your organization's values, ideas, and frameworks should be heard and felt through all interactions modeled from top leadership to the new hire. They should be a living, breathing presence in the room because they are such an integral part of your organizational culture and the people that perpetuate it.

One common misconception about open organizations is that they lack structure. To the contrary: in open organizations strong, obvious structures and frameworks set the flow for the ecosystem participants desire. In open organizations, however, structures don't just allow you to run an effective and efficient organization, but also allow for the emergence self-leadership and autonomy while still meeting strategic goals.

How you address your processes, workflows, and frameworks can make or break you. But, most importantly, your communication strategy and execution will be paramount to your organizational success.

Let's take a look at how Slalom is intentionally handling the challenges of scalability within their value-driven ecosystem.

Tipping point challenges

Founded in 2001, Slalom aims to do consulting differently. It has now landed on Fortune's 100 Best Places to Work (2016). Founders wanted to do purposeful work—and to do it in a way that allowed them to maintain the ability to do great work for their clients.

This meant they had to break typical organizational frameworks and build an open culture. They've been experiencing rapid growth, and like all organizations amid waves of change, continue to experience both wins and challenges.

Slalom noted several challenges to tackle when they hit their tipping points: consistency across markets, people development, and communication. Their approach to scalability is to intentionally build a strong, sustainable ecosystem through recruiting, people development, and feedback. They quickly learned that what worked for 80 consultants doesn't apply to the more than 4,500 they now employ.

One thing that has propelled them forward is their cultural ecosystem. Slalom is intentional about who and how they hire.

What does that mean for them? For starters, it means:

- experienced hires with different perspectives and a strong competency for feedback
- talent acquisition based on relationship first (investing in getting to know a person as more than a resume)
- looking for innovation tendencies, communication skills, coachability, knowledge and self-governance competencies

Leveraging people

Talent managers at Slalom have found that some people struggle with the responsibility of guiding their own career pathways. So they placed "Learning Leaders" in every market to support continuing education and to provide guidance and empowerment for career ownership.

Slalom encourages innovation and problem solving, which leads to a merit-based promotion system. Without the confines of a "set track to follow," employees are free to fill gaps they see when they bring solutions to the table.

"We strive to create diversity for our culture," Atkins said.. "We can then use different mindsets to come together as a team and deliver the best solutions for our clients."

Feedback loops and honest conversations

When an annual culture survey revealed that communication was not keeping up with growth, Slalom took the findings seriously. Leaders took to each market to discuss and ask for shared dialog.

As a result, an incredible number of 9,000 ideas emerged from all over the country. After filtering down the ideas to trends, passions, and strategic directions, Slalom had a strong base for their organizational direction based on feedback from their employees. They asked, listened, and put feedback into action.

Slalom also upped its communication game in a world demanding digital and real-time feedback, launching a series of videos from each core leader to explain strategic objectives. By taking such a personal approach, they've closed gaps that can occur in both distributed workforces and those that have grown to a significant size. The practice uses transparency and human connection to engage employees.

Slalom has also integrated real-time feedback loops into weekly time submissions. Asking their people (in the moment) how things are going keeps the feedback fresh and real. Closing these gaps can increase retention and improve work efforts.

Growing without sacrifices

I met again with Atkins several months after hearing about these plans. We were recording episodes of my podcast, *Generation Open*[34], on growing community[35] and building culture[36]. And again, we hit on what Slalom feels is their single, largest challenge they face: Continuing to scale up and grow without sacrificing quality.

With goals to grow their organization at 25% annually, the reality is they hire only 4% of the people they speak to during acquisition conversations.

Why?

They don't hire for "culture fit." It's about building their community, not buying talent.

"We tend to not hire people for jobs," Atkins said. "We want to hire you for a career. Our retention is incredibly high, our turnover is very low. So it really does come back to building a trusted relationship [...] not only with our folks internally, but also externally to make sure that it all comes together in a collaborative environment."

Here are some key ways that Slalom's talent acquisition process is different:

34 http://bit.ly/2o0zlUE

35 http://ldr21.com/6-scaling-without-sacrificing-quality-with-aaron-atkins/

36 http://ldr21.com/ep7-build-dont-buy-talent-trends/

- They coach potential talent through the acquisition process to grow and retain quality.
- They may choose to not hire an "A-Player" but might *build* one instead, if they feel they are the right long-term fit.
- They don't hire for culture fit. Instead they focus on capabilities and skill sets.

Coaching everyone—employee or not

Interestingly enough, Slalom coaches those they *don't* hire. Slalom's leaders feel all candidates deserve to learn how they can improve on something specific (so that, in the future, they might eventually become part of their firm). So closing the interview loop with a candidate means asking the right questions:

- What kind of questions are we asking?
- What kind of coaching are we subsequently giving back to the candidate to identify that skill gap?
- How can they improve upon it, so that in the future they can eventually become part of Slalom?

Slalom believes strongly in always doing the right thing. And in that spirit, leaders at Slalom may introduce candidates to a leader, coach them, or identify various opportunities for them to improve (because you never know when the goodwill will come back to you). Growing those they don't hire is an essentially community-building gesture—whether the candidate returns at a later date to become part of their team or not.

Forget sameness

Slalom's leaders seek to build an organization that's dynamic, inclusive, and diverse—as opposed to homogenized.

"We don't want to have a team of 10 people all from the same consulting firm. We want to have people from different walks of life, different backgrounds, different ideations," Atkins told me. We don't want to be a homogenized place where everyone is the same because we can't create unique thoughts, unique structures, and unique client deliverables without unique people. We want different people because they're going to push each other to create something unique."

Atkins went on to say: "Paradigm shifts in our thought diversity and culture can be extraordinarily difficult. And it requires [...] some people raising their hand, stepping up, and taking that risk. Culture change is a fair amount of work requiring some pretty honest, difficult discussions. It takes creating space for your community to have open discourse. It's the only way to make sure everyone is moving in the right direction."

It isn't easy

Scaling isn't easy. Even with a strong ecosystem in place, one powered by clear values and vision, growth comes with a fair share of challenges.

However, investing in your ecosystem from the beginning will help lessen the growing pains. Create strong structures for your people to operate. Leverage the wealth of talent within your people. Communicate with transparency and open real-time feedback loops to smooth transitions. Remain agile, and you'll find the right sustainable business models that work for you.

Slalom offers a great example of how an open culture works to achieve the sustainability of scale. Growing our communities based on the right kinds of relationships with people and choosing to do the right thing, whether it benefits us immediately or not, creates a more inclusive and collaborative world.

Jen Kelchner is a founding member of the Forbes Coaches Council and is a leadership and management consultant who solves problems and develops people. Her company, LDR21, focuses on change management, open principles, and cultural and operational change due to digital transformation.

Review and discussion questions

- What is "scalability," and what challenges does it present your organization?

- What do you think is a rapidly growing organization's most significant challenge? Why?

- Slalom takes a unique approach to hiring and coaching talent. Reflect on your organization's approach to these issues. How might you rethink hiring and coaching processes to better stress the principle of community?

- Slalom uses video technologies to shorten feedback loops and collapse the distance between organizational members. Could your organization do something similar? Why or why not?

Exercise

Author P. Byline

Exercise

Estimated time to complete:
Materials needed:
Skill level:
Target behaviors:

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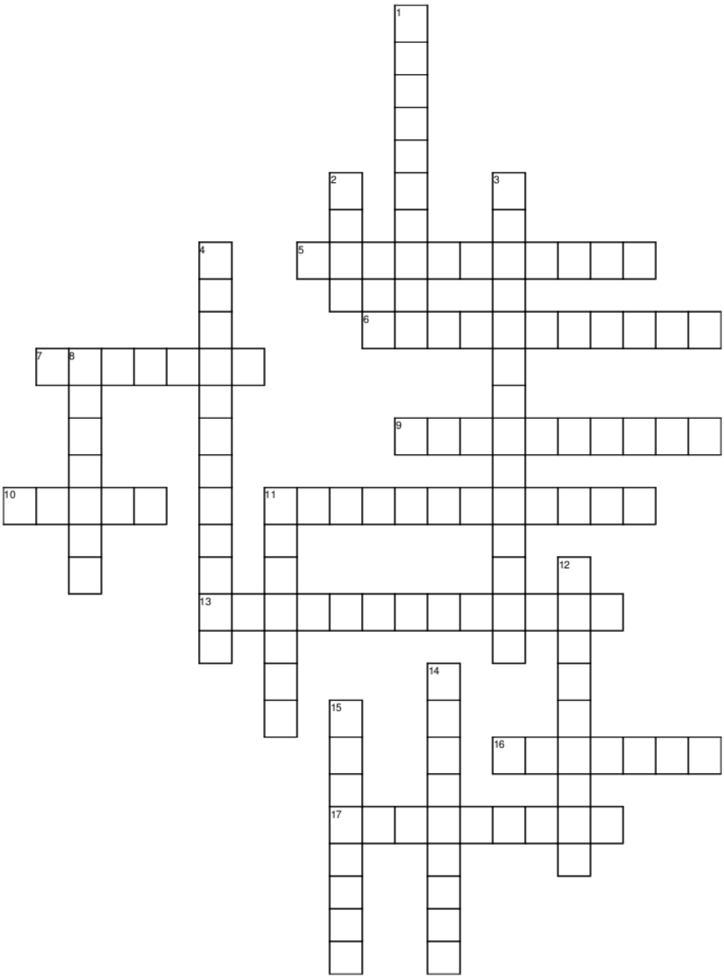
Appendix

An open organization crossword puzzle



Crossword clues

Across

5. A system for organizational governance designed to help the best ideas win
6. Organization's ability to incorporate multiple voices
7. Growing an open culture as an organization adds members
9. Passionate participation
10. Mutual assurance and dependence
11. Organization's ability to remain resilient and flexible
13. An approach to joint work that produces better results
16. A sense of history, purpose, and meaning that enables deeper and better work
17. Related to, but not synonymous with, inclusivity

Down

1. Production of something new and potentially path-breaking
2. A better way to work, manage, and lead
3. One consequence of increased transparency
4. Organization's approach to making important materials accessible
8. A shared set of values and beliefs, guides behaviors
11. Capacity for remaining nimble and responsive
12. A shared sense of identity forged through common purpose
14. Difficult to achieve with open decisions, but valuable to have when possible
15. Loops of data that produce beneficial iterations

The Open Organization Definition

Preamble

Openness is becoming increasingly central to the ways groups and teams of all sizes are working together to achieve shared goals. And today, the most forward-thinking organizations—whatever their missions—are embracing openness as a necessary orientation toward success. They've seen that openness can lead to:

- **Greater agility**, as members are more capable of working toward goals in unison and with shared vision;
- **Faster innovation**, as ideas from both inside and outside the organization receive more equitable consideration and rapid experimentation, and;
- **Increased engagement**, as members clearly see connections between their particular activities and an organization's overarching values, mission, and spirit.

But openness is fluid. Openness is multifaceted. Openness is contested.

While every organization is different—and therefore every example of an open organization is unique—we believe these five characteristics serve as the basic conditions for openness in most contexts:

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

Characteristics of an open organization

Open organizations take many shapes. Their sizes, compositions, and missions vary. But the following five characteristics are the hallmarks of any open organization.

In practice, every open organization likely exemplifies each one of these characteristics differently, and to a greater or lesser extent. Moreover, some organizations that don't consider themselves open organizations might nevertheless embrace a few of them. But truly open organizations embody them all—and they connect them in powerful and productive ways.

That fact makes explaining any one of the characteristics difficult without reference to the others.

Transparency

In open organizations, transparency reigns. As much as possible (and advisable) under applicable laws, open organizations work to make their data and other materials easily accessible to both internal and external participants; they are open for any member to review them when necessary (see also *inclusivity*). Decisions are transparent to the extent that everyone affected by them understands the processes and arguments that led to them; they are open to assessment (see also *collaboration*). Work is transparent to the extent that anyone can monitor and assess a project's progress throughout its development; it is open to observation and potential revision if necessary (see also *adaptability*). In open organizations, transparency looks like:

- Everyone working on a project or initiative has access to all pertinent materials by default.
- People willingly disclose their work, invite participation on projects before those projects are complete and/or

"final," and respond positively to request for additional details.

- People affected by decisions can access and review the processes and arguments that lead to those decisions, and they can comment on and respond to them.
- Leaders encourage others to tell stories about both their failures and their successes without fear of repercussion; associates are forthcoming about both.
- People value both success and failures for the lessons they provide.
- Goals are public and explicit, and people working on projects clearly indicate roles and responsibilities to enhance accountability.

Inclusivity

Open organizations are inclusive. They not only welcome diverse points of view but also implement specific mechanisms for inviting multiple perspectives into dialog wherever and whenever possible. Interested parties and newcomers can begin assisting the organization without seeking express permission from each of its stakeholders (see also *collaboration*). Rules and protocols for participation are clear (see also *transparency*) and operate according to vetted and common standards. In open organizations, inclusivity looks like:

- Technical channels and social norms for encouraging diverse points of view are well-established and obvious.
- Protocols and procedures for participation are clear, widely available, and acknowledged, allowing for constructive inclusion of diverse perspectives.
- The organization features multiple channels and/or methods for receiving feedback in order to accommodate people's preferences.

- Leaders regularly assess and respond to feedback they receive, and cultivate a culture that encourages frequent dialog regarding this feedback.
- Leaders are conscious of voices not present in dialog and actively seek to include or incorporate them.
- People feel a duty to voice opinions on issues relevant to their work or about which they are passionate.
- People work transparently and share materials via common standards and/or agreed-upon platforms that do not prevent others from accessing or modifying them.

Adaptability

Open organizations are flexible and resilient organizations. Organizational policies and technical apparatuses ensure that both positive and negative feedback loops have a genuine and material effect on organizational operation; participants can control and potentially alter the conditions under which they work. They report frequently and thoroughly on the outcomes of their endeavors (see also *transparency*) and suggest adjustments to collective action based on assessments of these outcomes. In this way, open organizations are fundamentally oriented toward continuous engagement and learning.

In open organizations, adaptability looks like:

- Feedback mechanisms are accessible both to members of the organization and to outside members, who can offer suggestions.
- Feedback mechanisms allow and encourage peers to assist one another without managerial oversight, if necessary.
- Leaders work to ensure that feedback loops genuinely and materially impact the ways people in the organization operate.

- Processes for collective problem solving, collaborative decision making, and continuous learning are in place, and the organization rewards both personal and team learning to reinforce a growth mindset.
- People tend to understand the context for the changes they're making or experiencing.
- People are not afraid to make mistakes, yet projects and teams are comfortable adapting their pre-existing work to project-specific contexts in order to avoid repeated failures.

Collaboration

Work in an open organization involves multiple parties by default. Participants believe that joint work produces better (more effective, more sustainable) outcomes, and specifically seek to involve others in their efforts (see also *inclusivity*). Products of work in open organizations afford additional enhancement and revision, even by those not affiliated with the organization (see also *adaptability*).

- People tend to believe that working together produces better results.
- People tend to begin work collaboratively, rather than "add collaboration" after they've each completed individual components of work.
- People tend to engage partners outside their immediate teams when undertaking new projects.
- Work produced collaboratively is easily available internally for others to build upon.
- Work produced collaboratively is available externally for creators outside the organization to use in potentially unforeseen ways.

- People can discover, provide feedback on, and join work in progress easily—and are welcomed to do so.

Community

Open organizations are communal. Shared values and purpose guide participation in open organizations, and these values —more so than arbitrary geographical locations or hierarchical positions—help determine the organization's boundaries and conditions of participation. Core values are clear, but also subject to continual revision and critique, and are instrumental in defining conditions for an organization's success or failure (see also *adaptability*). In open organizations, community looks like:

- Shared values and principles that inform decision-making and assessment processes are clear and obvious to members.
- People feel equipped and empowered to make meaningful contributions to collaborative work.
- Leaders mentor others and demonstrate strong accountability to the group by modeling shared values and principles.
- People have a common language and work together to ensure that ideas do not get "lost in translation," and they are comfortable sharing their knowledge and stories to further the group's work.

Version 2.0
April 2017
The Open Organization Ambassadors at Opensource.com
github.com/open-organization-ambassadors/open-org-definition

Learn More

Additional resources

The *Open Organization* mailing list

Our community of writers, practitioners, and ambassadors regularly exchange resources and discuss the future of work, management, and leadership. Chime in at www.redhat.com/mailman/listinfo/openorg-list.

The "Open Organization Highlights" newsletter

Get open organization stories sent directly to your inbox. Visit opensource.com/open-organization to sign up.

Discussion guides

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#OpenOrgChat

Our community enjoys gathering on Twitter to discuss open organizations. Find the hashtag #OpenOrgChat, check the schedule at opensource.com/open-organization/resources/twitter-chats, and make your voice heard.

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