The Open Organization Workbook

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Preface

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: Introductory

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

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

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.

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

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.*"

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

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.*"

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

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

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."

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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Case study

Author P. Byline

CASE STUDY

Organization:

Employees:

Industry:

Challenge:

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Review and discussion questions

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A 3-step process for making more transparent decisions

Sam Knuth

EXERCISE

Time required: 3–6 months

Materials necessary: Maecenas venenatis semper egestas

Activity type: Behavior change

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 con-

trol 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 judgements 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. Sharing is easier said than done.

- 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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Balancing agility and consensus

Peter Weis

CASE STUDY

Organization: Matson Navigation

Employees:

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 tradeoffs. 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? How would you describe your experiences with remote decision making?

• 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?

Exercise

Author P. Byline

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

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Unit 3: Adaptability

Introduction: What is adaptability?

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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Exercise

Author P. Byline

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

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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[5] and later with ADempiere[6] and metasfresh[7]. 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."

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

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

7 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:
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 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?

Exercise

Author P. Byline

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

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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[8] "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.

8 https://www.slalom.com/

When this explosion occurs, workflows suddenly become inefficient. Talent management struggles to keep up with onboarding, 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*[9], on growing community[10] and building culture[11]. 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:

9 http://bit.ly/2o0zlUE

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

11 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

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Target behaviors:

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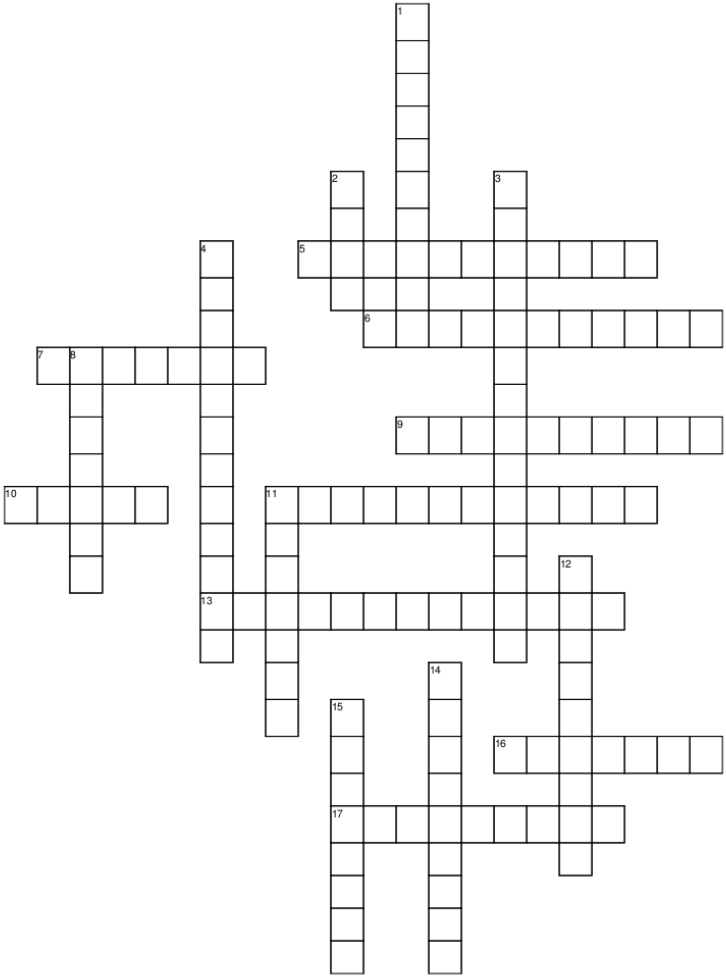
Appendix

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

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The Open Organization Ambassadors at Opensource.com

github.com/open-organization-ambassadors/open-org-definition

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