The Open Organization Leaders Manual

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The Open Organization Leaders Manual

Instructions for building the workplace of the future

Second Edition

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Colophon

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December 2018

2 http://dejavu-fonts.org/wiki/Main_Page

3 http://overpassfont.org/

4 https://www.libreoffice.org/

Additional reading

From Jim Whitehurst

The Open Organization: Igniting Passion and Performance (Harvard Business Review Press)

Organize for Innovation: Rethinking How We Work (Opensource.com)

From the open organization community

The Open Organization Field Guide: Practical Tips for Igniting Passion and Performance (Opensource.com)

The Open Organization Leaders Manual: Instructions for Building the Workplace of the Future (Opensource.com)

The Open Organization Guide to IT Culture Change: Open Principles and Practices for a More Innovative IT Department (Opensource.com)

The Open Organization Workbook: How to build a culture of innovation in your organization (Opensource.com)

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Preface to the second edition

Bryan Behrenshausen

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Introduction to the second edition

Jen Kelchner

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Introduction to the first edition

Dr. Philip A. Foster

Leadership is power. More specifically, leadership is the power to influence the actions of others. The mythology of leadership can certainly conjure images of not only the romantic but also the sinister side of the human condition. How we ultimately decide to engage in leadership determines its true nature.

Many modern understandings of leadership are born out of warfare, where leadership is the skillful execution of command-and-control thinking. For most of the modern era of business, then, we engaged leadership as some great man or woman arriving at the pinnacle of power and exerting this power through position. Such traditional leadership relies heavily on formal lines of authority through hierarchies and reporting relationships. Authority in these structures flows down through the vertical hierarchy and exists along formal lines in the chain of command.

However, in the late 20th century, something began to change. New technologies opened doors to globalism and thus more dispersed teams. The way we engaged human capital began to shift, forever changing the way people communicate with each other. People inside organizations began to feel empowered, and they demanded a sense of ownership of their successes (and failures). Leaders were no longer the sole owners of power. The 21st century leader leading the 21st century organization began to understand empowerment, collaboration, accountability, and clear communication were the essence of a new kind of power. These new leaders began *sharing* that power —and they implicitly trusted their followers.

As organizations continue becoming more open, even individuals without "leadership" titles feel empowered to drive change. These organizations remove the chains of hierarchy and untether workers to do their jobs in the ways they best see fit. History has exposed 20th century leaders' tendencies to strangle agility through unilateral decision-making and unidirectional information flows. But the new century's leader best defines an organization by the number of individuals it empowers to get something done. There's power in numbers—and, frankly, one leader cannot be in all places at all times, making all the decisions.

So leaders are becoming open, too.

Control

Where the leaders of old are focused on command-and-control positional power, an open leader cedes organizational control to others via new forms of organizational governance, new technologies, and other means of reducing friction, thereby enabling collective action in a more efficient manner. These leaders understand the power of trust, and believe followers will always show initiative, engagement, and independence. And this new brand of leadership requires a shift in tactics—from *telling people what to do* to *showing them what to do* and *coaching them along the way*. Open leaders quickly discover that leadership is not about the power we exert to influence progress, but the power and confidence we *distribute* among the members of the organization. The 21st century leader is focused on community and the edification of others. In the end, the open leader is not focused on self but is selfless.

Communication

The 20th century leader hordes and controls the flow of information throughout the organization. The open leader, however, seeks to engage an organization by sharing information and context (as well as authority) with members of a team. These leaders destroy fiefdoms, walk humbly, and share power like never before. The collective empowerment and engaged collaboration they inspire create agility, shared responsibility, ownership—and, above all, happiness. When members of an organization are empowered to do their jobs, they're happier (and thus more productive) than their hierarchical counterparts.

Trust

Open leaders embrace uncertainty and trust their followers to do the right thing at the right time. They possess an ability to engage human capital at a higher level of efficiency than their traditional counterparts. Again: They don't operate as command-and-control micromanagers. Elevating transparency, they don't operate in hiding, and they do their best to keep decisions and actions out in the open, explaining the basis on which decisions get made and assuming employees have a high level grasp of situations within the organization. Open leaders operate from the premise that the organization's human capital is more than capable of achieving success without their constant intervention.

Autonomy

Where the powerful command-and-control 20th century leader is focused on some *position* of power, an open leader is more interested in the actual *role* an individual plays within the organization. When a leader is focused on an *individual*, they're better able to coach and mentor members of a team. From this perspective, an open leader is focused on modeling behaviors and actions that are congruent with the organization's vision and mission. In the end, an open leader is very much seen as a member of the team rather than the *head* of the team. This does not mean the leader abdicates a position of authority, but rather understates it in an effort to share power and empower individuals through autonomy to create results.

Empowerment

Open leaders are focused on granting authority to members of an organization. This process acknowledges the skills, abilities, and trust the leader has in the organization's human capital, and thereby creates positive motivation and willingness for the entire team to take risks. Empowerment, in the end, is about helping followers believe in their own abilities. Followers who believe that they have personal power are more likely to undertake initiatives, set and achieve higher goals, and persist in the face of difficult circumstances. Ultimately the concept of an open organization is about inclusivity, where everyone belongs and individuality and differing opinions are essential to success. An open organization and its open leaders offer a sense of community, and members are motivated by the organization's mission or purpose. This creates a sense of belonging to something bigger than the individual. Individuality creates happiness and job satisfaction among its members. In turn, higher degrees of efficiency and success are achieved.

We should all strive for the openness the 21st century leader requires. This requires self-examination, curiosity—and, above all, it's ongoing process of change. Through new attitudes and habits, we move toward the discovery of what an open leader really *is* and *does,* and hopefully we begin to take on those ideals as we adapt our leadership styles to the 21st century.

Yes, leadership is power. How we use that power determines the success or failure of our organizations. Those who abuse power don't last, but those who share power and celebrate others do. By reading this book, you are beginning to play an important role in the ongoing conversation of the open organization and its leadership. And at the conclusion of this volume, you'll find additional resources and opportunities to connect with the open organization community, so that you too can chat, think, and grow with us. Welcome to the conversation—welcome to the journey!

September 2016

Dr. Philip A. Foster is the author of The Open Organization: A New Era of Leadership and Organizational Development*. He is a business consultant, international speaker, and the host of Maximum Change TV.*

Part 1:
Planning & Goal Setting

Creating teams that aren't afraid to fail

Catherine Louis

Successfully executing on a business goal implies raising questions about that goal—and it absolutely requires safe-to-fail experimentation on the path to achieving that goal. When business goals become inflexible mandates, experimentation goes by the wayside and a failure-adverse culture will prevail.

This four-step process can help open leaders cultivate a culture of experimentation in teams working toward a business goal (rather than creating the kind of failure-adverse culture that risks becoming less innovative).

Step one: Define your business goal

In general, there is no short of verbiage for defining business goals; however, as a starting point let's use Victor Basili's definition[5] of a conceptual goal:

> A goal is defined for an *object*, for a variety of *reasons*, with respect to various models of *quality*, from various *points of view*, relative to a particular *environment*.

I prefer this definition of a goal, because by analyzing its dimensions you'll end up creating a more clear, more compelling business goal:

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5 http://www.cs.umd.edu/~mvz/handouts/gqm.pdf

1. "A goal is defined for an **object**": What are we discussing here? Could it be our issue tracking system? Could it be the relationship between the issue tracking system and customers? Whiteboard this to visualize where your scope is.
2. "For a variety of **reasons**": What's the problem that needs to be addressed? When we state a goal, we include the purpose driving the goal!
3. "With respect to various models of **quality**": What's the quality issue with which we need help, and why is it an issue?
4. "From various **points of view**": From whose viewpoint are we discussing this goal? Customer? Project Manager? Whose opinion matters?
5. "Relative to a particular **environment**": Where and when is the issue being reported?

A business goal *implies* questions like these, and achieving it absolutely requires safe-to-fail experimentation. Providing a business goal as a mandate without allowing teams to question and fully understand the goal will shut a team down.

Take this poorly written business goal, for example:

> "We want to stop people from abandoning their shopping carts before purchasing."

Now, using Basili's definition, consider the following questions someone is likely to raise about this goal—and the kinds of responses that person is likely to receive from a leader less aware of the qualities that make a goal a good one:

- "What kind of shopping is being abandoned?"—"Any cart that isn't purchased."
- "Why?"—"Because I said so."

- "What's the quality issue we need to address?"—"Just get the cart purchased faster."
- "Who's 'we'?"—"Me, your Project Manager."
- "Where and when is this being reported?"—"Everywhere. Anywhere."

How's your motivation now? Do you feel like experimenting towards achieving the goal?

When taking a question-focused approach to setting goals, be sure to start with the goal! The ultimate test of effectiveness for a business goal is whether it motivates a team. A well-written goal stirs the blood.

Let's try this again. See if you can find all five points in this example of a goal:

> "The CEO of our e-commerce site selling women's apparel would like to see a significant improvement on the 1,000 to 2,000 abandoned shopping carts we see per day in the North American market to address this potential revenue gain. He is targeting at least 70% fewer shopping carts being abandoned per day."

Step 2: Ask questions about the goal

Next, encourage team members to ask questions about the goal. You'll need to start digging into the goal so you can understand it better, and the best way to get started is to ask a bunch of questions.

Some questions that come to mind are:

- Have we interviewed any shoppers about their shopping experience?
- How many clicks must users make from when they begin shopping to when a purchase is completed?

- Are non-NA markets not seeing these abandoned carts? Why?
- How long in duration is the average online shopping experience?
- Are the products presented in a clustered, attractive way versus being presented as one product per page?
- Are we using any advanced or custom filters which can improve onsite discovery and navigation?
- Do we support a fully-automated visual search for products?
- Do we understand the customer journey for ordering women's apparel online, and how much time is each step in this journey taking users?

Lots of questions are possible!

Prioritize these questions. Begin with the customer. In the example above, if you haven't done any customer interviews to hear and feel customer pains, then that's where I'd start.

Step 3: Decide how you're measuring progress

Data-driven improvements are possible. After you've analyzed your business goal, and then asked and prioritized the necessary questions about it, you should work with your team to establish baseline measurements of where you are today. This is your starting point. Begin using these metrics to structure your approach to answering your questions. For example, how many clicks do users typically make between the moment they start shopping and the time they've completed a purchase? Let real-time data guide your experimentation!

Using our example above, we might target:

- *Interview results of 80/100 customers with abandoned shopping cart experiences:* Have we interviewed any shoppers about their shopping experience?

- *Cycle time # clicks/purchase:* How many clicks are needed from when someone starts shopping to when a purchase is completed?
- *Cycle time/client:* How long is an average shopping experience on our platform?
- *# products/page/category:* Are the products presented in a clustered, attractive way versus being presented as one product per page?

Gather data so that you can develop a coherent baseline measurement of your starting point. If the customer journey today is a seven-click experience—and you think that reducing the number of clicks associated with this journey will lead to fewer abandoned carts—then gather data on average times users spend at each of these steps.

Step 4: Experiment

Innovation does not occur without experimentation. The good news is that each one of the questions above can now become an experiment.

Let's take one of the questions above and form an experiment so you get the idea:

> Are the products presented in a clustered, attractive way versus being presented as one product per page?

Let's address this question in the context of experimentation.

- **Restating the question as a hypothesis.** We believe that if we cluster our products in an attractive way, rather than looking at one product per page, more purchases will occur. (I recommend using the free Strategyzer test card[6] to help you organize your thoughts around creating your experiment once you have a hypothesis.)

- **KNOW YOUR RISKIEST ASSUMPTIONS.** One critical, risky assumption we're making is that more purchases will occur if different products are grouped in an attractive way. But what is an "attractive grouping," and to whom? Is it multi-colored blouses with neutral shoes? Is it blue shoes with white blouses? We'll need to experiment further to begin to answer this!

We've now created a solid foundation for experimentation. Next, we need to create a simple test experiment that we can begin to work on today to test our critical assumptions. We could attempt several kinds of experiments, including:

- **A/B TESTING**, a method of comparing two versions of a single variable—typically by testing a subject's response to variant A against variant B, then determining which of the two variants is more effective.
- **CONCIERGE TESTING**, or performing a service manually (just like a concierge at a hotel) with no technology involved. The idea here is to learn as much as you can via increased human interaction. A classic example of a concierge service is the beginning of AirBnB, where two guys rented out air mattresses in their home in San Francisco to validate what types of customers they might get with this type of service.[7]

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6 https://blog.strategyzer.com/posts/2015/3/5/validate-your-ideas-with-the-test-card

7 https://blog.adioma.com/how-airbnb-started-infographic/

- **LANDING PAGE**, a web page on which someone "lands" in response to some advertisement, or social media campaign. The goal of a landing page is to convert site visitors into sales or leads. You can analyze landing page activity to determine click-through or conversion rates and gauge the success of the advertisement. One classic example of this method of experimentation comes from Buffer, which launched with just two pages.[8] The first was a link to "plans and pricing," and if users that link, they received a message saying "oops, caught us before we were ready."
- **VIDEO**, or some audio-visual artifact to explain your product. Telling a story from a user-centric point of view, including a call-to-action, is a wonderful way to test a hypothesis. Dropbox did this in 2008 creating a 3 minute video posted to Digg, which expanded their waiting list from 5,000 to 75,000 literally overnight.
- **WIZARD OF OZ**, a method in which it *looks like you have a fully functioning product/feature*, but there's really someone "behind the curtain" doing all the work. A classic example of this test is Zappos. Founder Nick Swinwarm reserved the domain name and, without building any sort of inventory system, walked down the street to the local shoe store, took photographs of shoes, and posted them on the website.[9]

8 https://blog.bufferapp.com/idea-to-paying-customers-in-7-weeks-how-we-did-it

9 https://www.safaribooksonline.com/library/view/the-lean-entrepreneur/9781118331866/

In our example, let's say it's the first day of summer, so we decide to do a simple A/B test grouping summer shoes with summer blouses arranged by summer colors. Perhaps we create five groupings of various colors of shoes and blouses in order to begin gathering data. For example, we might run five experiments with the groupings of multi-colored blouses with neutral shoes, blue shoes with white blouses, red shoes with multi-colored blouses, green blouses with beige shoes, and yellow shoes with yellow pattern blouses.

- **Decide what to measure.** Perhaps we decide to measure click-through rates on products grouped versus products displayed one at a time, as well as the number of shoes sold versus the number abandoned in shopping carts.
- **Name your criteria for success.** For example, if 10% fewer shoes are abandoned in carts per month when grouped with blouses by summer colors, we'd be happy with this experiment.

For this example, the resulting test card might end up looking like this:

- *Hypothesis:* We believe that if we cluster our products in an attractive way, rather than looking at one product per page, more purchases will occur.
- *Test:* To verify or refute this hypothesis, we will run A/B tests grouping summer shoes with summer blouses arranged by summer colors versus displaying blouses and shoes one product at a time.
- *Metric:* We will measure both click-through rates and sales of both shoes and blouses displayed one product at a time and those same products displayed in summer color groups.

- *We are right if:* 10% more shoes are sold per month when grouped with blouses by summer colors
- *Follow up:* To further refine attractive product groupings, we will compare the results to learn which product groupings are more appealing and design our next experiment based on this.

Note that experimenting doesn't end here; it's just the beginning! Stated another way: Your team won't achieve its business goal without cultivating and embracing a culture that allows us to experiment, fail, adjust and learn.

Catherine Louis is a Certified Scrum Trainer, independent Agile coach, founder of CLL-Group.com, PoDojo.com, and founding member of Tech Ladies®.

Chapter title

Author McLastName

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Developing a culture of experimentation on your team

Catherine Louis

Most companies support the idea of incorporating innovation into their business strategies, as it can help increase market share and generate additional profits through new products or service offerings.

But too often, these same companies fail to realize that innovation doesn't occur without experimentation. To successfully innovate, you need to conduct experiments—lots of experiments. Some will succeed, and lots more will fail. By definition, *experimentation* is "the process of performing a scientific procedure, especially in a laboratory, to determine something" as well as "the action or process of trying out new ideas, methods, or activities." Innovative organizations don't isolate such innovation practices to certain segments of the business; they cultivate an *attitude* of experimentation throughout, weaving it into the very fabric of the entire organization.

So the question for your innovative organization becomes "How do we create a culture that allows us to be comfortable with trying out new ideas, methods, and activities using a scientific procedure?" Having a healthy culture of experimentation is the only option if teams wish to innovate. And organizational leaders can play a significant role in fostering that kind of culture.

Before teams can even begin operating in an experimenting mode, leaders must shift their mindset to operate not like a know-it-all, but as if the world is truly a complex space, that we don't know it all, and that we can't know something unless we try it out.

When I visit companies and hear leaders say things like the following, I quietly take them around back for coaching:

- "Your demo failed." (This is usually accompanied by a scolding face.)
- "You need to run everything by me before conducting a test with the customer." Screeching brakes are heard as innovation comes grinding to a halt.
- "Let's do a dress rehearsal showing the customer how this operates before giving them the feature to manipulate." No, no, no—put the software in your customer's hands as early as possible. You'll learn what's wrong with your user interface. You'll reduce risk, increase quality, and build a relationship with the customers.
- "Well, obviously they need [*insert feature X that will get me my bonus if released within the year*]." Carefully think about how your compensation program may hinder creating an experimentation culture.

Taking a deeper look at the first three points, fear of failure is overwhelmingly the operating model. The last point is a desire for monetary success over doing what's right for the customer, regardless of where the idea comes from.

Instead, we want leaders involved in conversations to encourage experimentation. Those conversations sound like this:

- "What is the customer's problem? Have you observed this?"
- "What is your hypothesis?"

- "What are your critical assumptions that must be true for your idea to work?"
- "Do you need help designing an experiment to test if your hypothesis is true or false?"
- "What can you test to (in)validate your hypothesis?"

So how can you move from the first kind of conversation to the second? Here's my advice: Don't wait for the perfect moment—just start!

Here are nine pointers to help get you start experimenting as a team:

1. Don't jump into the solution space. First, define your problem. State it as a hypothesis.
2. List all of your assumptions.
3. On a 2x2 matrix, rank each assumption in terms of uncertainty versus risk. Identify the highest-risk, most uncertain assumptions before moving on to step 4.
4. Create a simple test experiment that you can begin to work on today. Action is key; however, think low-fidelity, rapid prototyping to be able to run this test. (For ideas on how to start prototyping, try the exercise at the end of this article.) In other words, be able to collect as much information with as little effort as possible. The key is to run your experiment with real people to get real results. The free test cards from Strategyzer are wonderful to help get teams thinking with a test mindset. Each card begins by stating the hypothesis, then the test, an accompanied metric, and criteria for success.

5. Gather the data and record everything: The data you collect and record will guide you further.
6. Review results as a team. If you use the test card, you will have thought about criteria for judging whether your test was a good one. Ask questions! What did you learn? Do you need to change your hypothesis based on what you learned? Do you need to do a new experiment? Do you need more data?
7. Share the results with the rest of the organization—especially the failed experiments.
8. Celebrate the learnings. You don't need to copy Spotify's Failure Wall (described in Henrick Kneiberg's Engineering Culture, Part II), but the point is to celebrate what you learned, and how you want to conduct the next experiment to incorporate what you want to change.
9. Rinse and repeat!

Steps 7-9 are crucial for leaders to help make this culture change stick. Leaders must hold the space where anyone can experiment. Anyone can run a failed experiment because these failed experiments mean we learn. You need to make it safe to take risks and to remove impediments. Start today with your own new mentality that will sweep across the entire organization: Instead of "no failure is allowed here," adopt the mindset of "We won't know until we run an experiment." It's your only option if you wish for innovation to happen.

A brief example: Dollar Shave Club

Dollar Shave Club's hypothesis was that men don't need fancy razors with lots of fancy features, nor do they want to spend time shopping for them. Their experiment involved creating a one-minute video[10] sharing the problem and offering a solution by inviting viewers to link to a landing page where they could place an order. Within 48 hours, they knew the experiment worked: They had received more than 12,000 orders.[11]

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10 https://www.youtube.com/watch?v=ZUG9qYTJMsI

11 https://www.inc.com/magazine/201707/lindsay-blakely/how-i-did-it-michael-dubin-dollar-shave-club.html

Part 2:
Organizational Design & Culture Building

Chapter title

Author McLastName

In *The Open Organization*, Jim Whitehurst defines an open organization as one that "engages participative communities both inside and out." For Whitehurst, the success of future organizations depends on their ability to successfully interact with, learn from, and support the broader communities surrounding their work and their products.

But working this way doesn't come naturally to all leaders. In this chapter, I'll not only explain the important role community plays in an open organization's existence but also explore why an organization would want to build a community in the first place. I'll share with open leaders the lessons I've learned leading my own open organization for several years—because I really do believe it's the best way to generate new innovations today.

The crazy idea

When we launched Nethesis in 2003, we were just system integrators. We only used existing open source projects. Our business model was clear: Add multiple forms of value to those projects: know-how, documentation for the Italian market, extra modules, professional support, and training courses. We gave back to upstream projects as well, through upstream code contributions and by participating in their communities.

Times were different then. We couldn't use the term "open source" too loudly. People associated it with words like: "nerdy," "no value" and, worst of all, "free." Not too good for a business.

On a Saturday in 2010, with pasties and espresso in hand, the Nethesis staff were discussing how to move things forward (hey, we like to eat and drink while we innovate!). In spite of the momentum working against us, we decided not to change course. In fact, we decided to push harder—to make open source, and an open way of working, a successful model for running a business.

Over the years, we've proven that model's potential. And one thing has been key to our success: community.

Together with the Nethesis guys, we decided to build our own open source project: our own operating system, built on top of CentOS (because we didn't want to reinvent the wheel). We assumed that we had the experience, know-how, and workforce to achieve it. We felt brave.

And we very much wanted to build an operating system called NethServer with one mission: making a sysadmin's life easier with open source. We knew we could create a Linux distribution for a server that would be more accessible, easier to adopt, and simpler to understand than anything currently offered.

Above all, though, we decided to create a real, 100% open project with three primary rules:

- completely free to download,
- openly developed, and
- community-driven

That last one is important. We were a company; we were able to develop it by ourselves. We would have been more effective (and made quicker decisions) if we'd done the work in-house. It would be so simple, like any other company in Italy.

But we were so deeply into open source culture culture that we chose a different path.

We really wanted as many people as possible around us, around the product, and around the company. We wanted as many perspectives on the work as possible. We realized: Alone, you can go fast—but if you want to go far, you need to go together.

So we decided to build a community instead.

We realized that creating a community has so many benefits. For example, if the people who use your product are really involved in the project, they will provide feedback and use cases, write documentation, catch bugs, compare with other products, suggest features, and contribute to development. All of this generates innovations, attracts contributors and customers, and expands a product's user base.

But quickly the question arose: How can we build a community?

We didn't know how to achieve that. We'd *participated* in many communities, but we'd never *built* one.

We were good at code—not with people. And we were a company, an organization with very specific priorities. So how were we going to build a community and foster good relationships between the company and the community itself?

We did the first thing one must do: study. We learned from experts, blogs, and lots of books. We experimented. We failed many times, collected data from the outcomes, and tested them again.

Eventually we learned the golden rule of the community management: There is no golden rule of community management People are too complex and communities are too different to have one rule "to rule them all."

One thing I can say, however, is that an healthy relationship between a community and a company is always *a process of give and take*. In the rest of this chapter, I'll explain what that means.

Giving

When we launched the NethServer community, we realized early that to play the open source game we needed to follow the open source rules. No shortcuts. We realized we had to convert the company into an open organization and start working in the open.

We are aware that for many companies, introducing open innovation involves a significant cultural shift. We at Nethesis are always struggling with that, even if being open is our mission. But I have to be honest: It's not at all easy.

If your company expects to benefit from a relationship with a strong community, it has to *give first* in order to build a solid relationships based on reciprocal trust and transparency.

And giving code is not enough. *Releasing an entire open source project* isn't enough.

The truth is that you have to invest in people. You have to put people first, and put people before code. As a company, you have to devote your time to building relationships—and giving first.

Building community is not an efficient short-term strategy. And even if it gets you some quick returns in three to six months, those returns will be a very small representation of the full potential value you could be reaping. It's a long journey and it takes time. Results can take months or years of work.

But it pays off! Trust me. If you're a leader hoping to leverage the power of community, remember the following.

A community isn't strictly a marketing channel. It's an entirely different animal. Your community doesn't exist for you to engage in direct sales (I keep my community at a safe distance from my salespeople). You can't even use the same types of communication; in marketing, the message is from the company to the audience. In the community, the communication is primarily member to member, and you exist to make that easier.

Clarify the relationship as soon as possible. Why has the organization decided to build a community and support the project? What does it hope to gain? Conversely, what will the community gain? A company should understand a community's needs and expectations in order to earn its trust. You can't ask people to devote their time if they think that you're making money from their volunteer efforts. Don't leave space for grey areas here. In our case, we stated that NethServer is a community effort, founded and sponsored by a company (Nethesis). Nethesis' business model is to sell software, professional support, and services to other companies, customers, and resellers. We use a portion of our revenue to fund the development of NethServer (official site hosting, community initiatives, sponsoring, and so on). Community and company have the same target: making NethServer better and more successful. And NethServer benefits enormously from the resources that the company invests into it. The company pays NethServer coders to write features that the customers and users need and works with the community to make NethServer a better product. Because the company works in the open and as part of the community, and because the code is released under the GPLv3, NethServer itself will continue to be free. That's a virtuous circle—everyone wins.

Community managers aren't solely responsible for the community. Great leaders ensure that the *entire company* is responsible for working with the community. Community-centric companies involve participation from as many employees as possible, so they involve other staff members in community discussions and initiatives. Yes, you should hire a community manager if you're serious about building community. It should be a full-time role—someone in charge of facilitating the relationships between these entities, especially in the early stages. But the entire organization needs to support the community and its mission. For example, I personally am both the voice of the community inside company and the voice of the company inside the community. Actually, to succeed at the job, I must participate at a level that can appear to be disloyal to my employer and in favor of the community; I'm a kind of diplomat and translator between the community and the company. I'm really the middleman.

Next, let's discuss what your organization should *expect to give* if it wants to cultivate community. I'll explore five key requirements.

1. Be welcoming

You should be aware that someone's first experience of and in the community is critical, so be sure people feel acknowledged when they encounter you. They have to know what to do first after they've joined you. Follow their first posts or activities with a prompt response. Receiving a response after a few days is a bad welcome for newcomers.

In my community, for example, I create a welcoming post, in which I offer my warm welcome to the new people and ask them to feel safe and to introduce themselves: What are you working on? Why are you here?[12]

You would be amazed at how these simple sentences unleash positive behaviors from newcomers. You show not only that you've have noticed they're here, but also that you care

12 https://community.nethserver.org/t/weekly-welcome-to-new-members-25-jul-16/3999

about them, their lives, and their aims. Suddenly, they feel at home and compelled to participate, if only to give back and thank you for the attention.

You can't set the proper cultural tone alone. Creating an ambassador group might help.[13] This group should be the community's engine, a group that's able to set a high bar, nurture a culture, and share your community vision, mission, and values.[14] Our Ambassadors have a set of social norms and rules that they undertakes to respect: lead by example, be humble, be inclusive, be full of gratitude, show your passion, be playful.

The don't just live those rules; they live them every single day.

2. Be inclusive

You have to create an environment in which people feel safe. It doesn't matter how fun and amazing your project is. If people don't feel safe, then they won't contribute. That's a big problem in many technical communities.

You can avoid this by creating rules that help structure a safe environment and help people lead by example. Writing your rules somewhere is not enough to create a welcoming and inclusive culture in a technical community—you have to live these rules.

In our NethServer community,for instance, we have a simple rule and invitation for new people: "Don't be afraid to ask stupid questions. Someone else will learn from every stupid

13 https://community.nethserver.org/t/nethserver-ambassadors-group/4782

14 https://community.nethserver.org/t/thoughts-about-nethserver-mission-vision-and-values/4080

question that you ask."[15] It's a very powerful rule, and it helps us achieve an important goal: being inclusive.

Here's another (related) rule: The phrase "RTFM" is banned. "Read the F****** Manual" is not an answer. It's not inclusive. It actually *excludes* people, and doesn't help people feel like they can safely ask questions. Instead we point newcomers to documentation for simple solutions and give them links to specific information. Sure, that takes more time—but it is much friendlier.

3. Listen to your community first, then speak

This is very difficult. Truly listening is *hard*. You will be tempted to steer the discussion too much and not listen. Don't do this. Be open-minded and be ready to change your mind. Be ready to have genuine discussions and make sure your community leaders are ready to do the same.

Listening alone is not enough. You should teach your community how to successfully hold discussions and how to effectively explain their needs to one another. Show them that you're inclined to listen if they are ready to discuss everything.

For instance, members should be aware that suggesting a new feature is not enough to get that feature implemented. They have to convince the whole community that such a feature is essential for the project. They have to fight for that. Then, you have to be ready to chime in the discussion, actively listen, and distill good ideas.

As a reminder of what it means to truly listen, I always return to this quote from Simon Sinek:

15 https://community.nethserver.org/faq

> When we're close to ideas, what we hear is criticism. When we're open to criticism what we get is advice.[16]

Remember that every time you need to reply to someone.

4. Be transparent

You'll be tempted to keep your discussions private. You should tell anyone accustomed to working in secret to stop doing that and to become more transparent. Otherwise, no contributors can actually understand what is going on, and no one will feel like they can get involved.

Put another way: Try to work out loud. Show what you are working on, and keep people updated on your last achievements. Ask all community members to do the same.

Here's a concrete way to practice transparency. I could give some common pieces of advice, like:

- Have all your bugs completely public and visible to everybody
- Have all features requested exposed
- Maintain a public development planning document and a clear roadmap
- Make sure all code changes are done in the form of pull request

. . . and all of them would be perfectly applicable. But they're not enough.

Traditionally, much of the development that occurs in open source space happens in code repositories and bug trackers, and those are not places that users of the software tend to hang out. This separation between developers and users means users don't really see development discussions happening, and

16 https://twitter.com/simonsinek/status/199260848663969793

contributors may not always get feedback or well-deserved acknowledgments from users.

We use our community platform on Discourse for everything: support requests, bugs, testing processes, development discussions, community organization—really everything![17] We use GitHub just to keep track of issues, code changes, pull requests, and technical stuff. This means developers can help people with support questions, for example, or they can help with the community discussions. They could be pretty involved everywhere.

Everything is public. Everything is clear. We have a unique place to congregate as we bring everyone together.

5. Lead the support, at least at the beginning

As a company, you must take over the support requests, since asking a question and waiting for an answer for days is a frustrating feeling. That's a bad first experience for new contributors and customers alike.

But answering all the support questions is not enough, and it doesn't scale. Train your community to answer instead. It's way more sustainable in the long run.

You can't be always the only one who helps. Involving others in this process becomes essential. Here's a simple tip: Call upon specific people to help other specific people. Doing that, you'll obtain three outcomes:

- Called into question, people will be more inclined to participate and lend a hand
- People feel like experts in the field, and that helps them realize their own strengths

17 https://community.nethserver.org/categories

- Newcomers will feel like they've truly helped, and they'll often be thanked for their efforts, which is very satisfying

So far, we've seen that open organizations can benefit from relationships with strong communities only if they're ready to give first. And giving code is not enough.

Open organizations (and open leaders) have to provide what communities really need: a genuine and transparent relationship with the organization and other members. Put people first and you won't regret it.

Taking

As I've already mentioned, our product wouldn't be what it is today without the vibrant community that surrounds and supports it. So let's discuss how that happened by exploring what your organization should expect to receive from its investment in people. You'll be able to see the kinds of benefits that will take your business to the next level—and beyond.

Let's review six benefits.

1. Innovation

"Open innovation" occurs when a company sharing information also listens to the feedback and suggestions from outside the company. As a company, we don't just look at the crowd for ideas. We innovate in, with, and through communities.

You may know that "the best way to have a good idea is to have a lot of ideas."[18] You can't always expect to have the right idea on your own, so having different point of views on your product is essential. How many truly disruptive ideas can a small company (like Nethesis) create? We're all young, caucasian, and European—while in our community, we can pick up a

18 https://www.goodreads.com/author/quotes/52938.Linus_Pauling

set of inspirations from a variety of people, with different genders, backgrounds, skills, and ethnicities.

So the ability to invite the entire world to continuously improve the product is no longer a dream; it's happening before our eyes. Your community could be the idea factory for innovation. With the community, you can really leverage the power of the collective.

2. Research

A community can be your strongest source of valuable product research.

First, it can help you avoid "ivory tower development." As Stack Exchange co-founder Jeff Atwood has said, creating an environment where developers have no idea who the users are is dangerous. Isolated developers, who have worked for years in their high towers, often encounter bad results because they don't have any clue about how users actually use their software. Developing in an ivory tower keeps you away from your users and can only lead to bad decisions. A community brings developers back to reality and helps them stay grounded. Gone are the days of developers working in isolation with limited resources. In this day and age, thanks to the advent of open source communities research department is opening up to the entire world.

No matter who you are, most of the smartest people work for someone else. And community is the way to reach those smart people and work with them.

Second, a community can be an obvious source of product feedback—always necessary as you're researching potential paths forward. If someone gives you feedback, it means that person cares about you. It's a big gift. The community is a good place to acquire such invaluable feedback. Receiving early feedback is super important, because it reduces the cost of developing something that doesn't work in your target market. You can safely fail early, fail fast, and fail often.

And third, communities help you generate comparisons with other projects. You can't know all the features, pros, and cons of your competitors' offerings. The community, however, can.[19] Ask your community.

3. Perspective

Communities enable companies to look at themselves and their products from the outside,[20] letting them catch strengths and weaknesses, and mostly realize who their products' audiences really are.

Let me offer an example. When we launched the NethServer, we chose a catchy tagline for it. We were all convinced the following sentence was perfect:

> NethServer is an operating system for Linux enthusiasts, designed for small offices and medium enterprises.

Two years have passed since then. And we've learned that sentence was an epic fail.

We failed to realize who our audience was. Now we know: NethServer is not just for Linux enthusiasts; actually, Windows users are the majority. It's not just for small offices and medium enterprises; actually, several home users install NethServer for personal use. Our community helps us to fully understand our product and look at it from our users' eyes.

19 https://community.nethserver.org/tags/comparison

20 https://community.nethserver.org/t/improve-our-communication/2569

4. Development

In open source communities especially, communities can be a welcome source of product development.

They can, first of all, provide testing and bug reporting. In fact, if I ask my developers about the most important community benefit, they'd answer "testing and bug reporting." Definitely. But because your code is freely available to the whole world, practically anyone with a good working knowledge of it (even hobbyists and other companies) has the opportunity to play with it, tweak it, and constantly improve it (even develop additional modules, as in our case). People can do more than just report bugs; they can fix those bugs, too, if they have the time and knowledge.

But the community doesn't just create code. It can also generate resources like how-to guides,[21] FAQs, support documents, and case studies. How much would it cost to fully translate your product in seven different languages? At NethServer, we got that for free—thanks to our community members.

5. Marketing

Communities can help your company go global. Our small Italian company, for example, wasn't prepared for a global market. The community got us prepared. For example, we needed to study and improve our English so we could read and write correctly or speak in public without looking foolish for an audience. The community gently forced us to organize our first NethServer Conference, too—only in English.[22]

21 https://community.nethserver.org/c/howto

22 https://community.nethserver.org/t/nethserver-conference-in-italy-sept-29-30-2017/6404

A strong community can also help your organization attain the holy grail of marketers everywhere: word of mouth marketing (or what Seth Godin calls "tribal marketing").[23]

Communities ensure that your company's messaging travels not only from company to tribe but also "sideways," from tribe member to potential tribe member. The community will become your street team, spreading word of your organization and its projects to anyone who will listen.

In addition, communities help organizations satisfy one of the most fundamental members needs: the desire to belong, to be involved in something bigger than themselves, and to change the world together.

6. Loyalty

Attracting new users costs a business five times as much as keeping an existing one. So loyalty can have a huge impact on your bottom line.

Quite simply, community helps us build brand loyalty. It's much more difficult to leave a group of people you're connected to than a faceless product or company. In a community, you're building connections with people, which is way more powerful than features or money (trust me!).

Conclusion

Open leaders should never forget that working with communities is always a matter of giving and taking—striking a delicate balance between the company and the community.

And I wouldn't be honest with you if I didn't admit that the approach has some drawbacks. Doing everything in the open means moderating, evaluating, and processing of all the data you're receiving. Supporting your members and leading the dis-

23 https://www.ted.com/talks/seth_godin_on_the_tribes_we_lead

cussions definitely takes time and resources. But, if you look at what a community enables, you'll see that all this is totally worth the effort.

As my friend and mentor David Spinks keeps saying over and over again, "Companies fail their communities when when they treat community as a tactic instead of making it a core part of their business philosophy."[24] And as I've said: Communities aren't simply extensions of your marketing teams; "community" isn't an efficient short-term strategy.[25] When community is a core part of your business philosophy, it can do so much more than give you short-term returns.

At Nethesis we experience that every single day. As a small company, we could never have achieved the results we have without our community. Never.

Community can completely set your business apart from every other company in the field. It can redefine markets. It can inspire millions of people, give them a sense of belonging, and make them feel an incredible bond with your company.

And it can make you a whole lot of money.

Community-driven companies will always win. Remember that.

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24 http://cmxhub.com/article/community-business-philosophy-tactic/

25 https://opensource.com/open-organization/18/2/why-build-community-2

What it means to be an open leader

Jim Whitehurst

Being an open leader means creating the context others need to do their best work.

That's a relatively short sentence, but for anyone wishing to lead a group in the 21st century, its implications are enormous. And if you're hoping to be one of those people—if you're hoping to have a career leading an open organization—then you must not only understand what it means, but also recognize ways you can put it into practice, so you can build a culture that creates a strategic, competitive advantage for your organization.

Context shapes culture

Culture is something management gurus are increasingly taking more seriously. "Culture eats strategy for breakfast[26]," I've heard people say. But I'm not sure that all of those folks truly understand *why* this is the case.

Despite depictions in popular media, a great company culture isn't simply the result of workplace perks and ping pong tables. Culture is the result of sufficient *context*—a shared set of values, a shared purpose, and shared meanings.

Being a leader in an open organization, then, means making connections: It involves doing the work of linking people both to each other and to some larger, shared picture. It's help-

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26 http://techcrunch.com/2014/04/12/culture-eats-strategy-for-breakfast/

ing people understand how they can contribute to a collective effort in meaningful ways.

As a leader, you create context when you help everyone in the organization understand its whole mission: the vision, the values—all the elements that define your very reason for existing. An open leader also helps people recognize the vast sum of interactions taking place that make an organization what it is—the aims, goals, and passions that push individuals to work together.

So when we talk about "creating context," we're really talking about bringing these two facets of organizational life together in exciting and productive ways. An open leader aligns passion with purpose, action with vision. And that creates a culture where people feel inspired, motivated, and empowered to do their very best work.

Shaping that culture begins with an emphasis on sharing.

Learn to share

In conventional organizations, "knowledge is power." But in open organizations, that well-worn adage can be a destructive and downright disastrous guiding principle.

Some leaders believe that extending trust and operating transparently will somehow diminish their power. In reality, however, leaders should be sharing as much as they can with their organizations. Sharing information is how leaders begin to build the context that people in an organization need to forge connections between their passions and the organization's mission. Open leaders are honest about the problems they face, the worries they carry, and the limits they possess—because, in the end, the problems leaders face are the problems *everyone* faces. *Shared* knowledge is power.

The problems leaders hear about from customers—the things that keep them up at night—that's the information we need to share with our entire organization. Because when we provide that context and share those problems, we inspire and empower people to help us overcome them. In *The Open Organization*, for instance, I describe how sharing my priority of making Red Hat more customer-focused—and thereby inviting others to help me achieve it—generated unique, creative, and valuable insights from people across the organization.

I've met people who believe "sharing more" actually means "delegating more." But that's not necessarily the case. In the traditional sense, "delegation" involves sharing responsibility for implementing a solution the leader has already dreamed up and settled on. What I'm talking about is different: sharing the work of *actually developing* those solutions, so associates have genuine influence over both the course their work will take and the purpose it will serve.

If this sounds hard, that's because it is. At Red Hat, we put a lot of effort behind hiring for and developing these kinds of leadership capabilities. We take the time to explain them to people, to coach people on what it takes to connect, to be transparent, and to extend trust.

We even talk about what overuse and underuse of these capabilities looks like. For example, we've found that it's important to explain that transparency isn't an excuse for rude behavior, nor does it mean you disclose confidential information about associates or our business. Trust doesn't mean you give people assignments without any direction or context, or that you fail to verify that work they've completed.

Develop your EQ

In an open organization, leaders must be sensitive to nuances—knowing how to share and how to invite collaboration in ways that keep an organization from dissolving into chaos. A leader's mandate to help people do their best work involves not just an understanding of leadership capabilities like connection, trust, and transparency, but also a certain familiarity with—and sensitivity to—the feelings, emotions, and passions of the people that leader is trying to help.

In *The Open Organization*, for example, I discuss the need for leaders to share half-baked ideas with their organizations, to bring plans or concepts to the table before they're fully developed, in order to receive productive feedback sooner. The best leaders can pinpoint precisely when to present a half-baked idea —not so early as to distract people with an idea that may not play out, but not so late as to preclude any opportunity for productive discussion.

Spotting those opportune moments—really sensing them—requires leaders to be in tune with their organizations' emotional atmospheres.

Think about it this way: Great leaders give people enough structure to know they're marching up the right hill, but those leaders don't want to prescribe a single road north, because they need the people making the journey to feel empowered to control that journey. This way, they don't exhaust themselves trying to climb over a massive rock in their way, and instead devise a smarter method for getting around it.

The trick for leaders is providing enough clarity of purpose—enough context—that people are able to help an organization accomplish its goals, but not so much that they're impeded from exercising their creativity and initiative in the process.

Information overload doesn't create context. Distraction doesn't create context. Strong emotional intelligence helps leaders avoid both.

Be a catalyst, not a commander

Deciding to share (and determining how to share) drives open leaders to an important conclusion: a group is always going to produce a better solution than an individual.

Leaders of conventional organizations are commanders. They dictate and prescribe both means and ends, then monitor people to make sure they use the former to achieve the latter.

Leaders of open organizations are catalysts.

Chemistry tells us that a catalyst is an agent that, when added to a mixture, sparks a productive change. This is precisely the role leaders play in open organizations. They create context that invites people into relationships with new (even surprising) results. And they do this because they believe, truly and deeply, that the groups they help form will develop better solutions than the leader could alone.

I won't deny it: Being a leader means constantly being tempted to step in, to force decisions, to *command*. Commanders generally consider collaborative dialogue a grueling waste of time ("I just need to tell people what to do," they say). Sure, they may go so far as to hold meetings about, invite comments on, and ask for feedback regarding their ideas. But in the end, those are empty gestures, because they've already decided that they know what's best.

Catalysts, on the other hand, believe that if they get the right conversations going—if they spark the right kinds of collaboration—then their organizations will realize better results. Leaders can only become catalysts when they let go of the assumption that, categorically, they know best.

Without a doubt, being a catalyst is actually more difficult than being a commander. Since open organizations tend to be meritocracies, in which reputation and a long history of concrete contributions trump job titles as markers of organizational power and influence, leaders must be constantly balancing the skills, personalities, and cultural capital they see in their colleagues. Far from dictating, they need to master the art of making appropriate connections—producing the proper combinations—that ignite the most influential innovations.

Yet being a catalyst is also more rewarding than being a commander. Parents, consider this: Did you feel more proud when you graduated from college, or when your kids graduated from college? If you're like me, the answer is: your kids. Catalysts experience that same sense of pride parents do when they watch those they've helped succeed.

A checklist

So here's a checklist for those hoping to make a career leading an open organization. Being an open leader requires:

- **Willingness** to extend trust and share information
- **Appreciation** for transparency and collaboration whenever possible
- **Sensitivity** to the moods, emotions, and passions of the people that make up an organization
- **Knowledge** of not only what to share, but how to share it
- **Belief** that groups will consistently outperform individuals working in isolation
- **Trust** in those groups to drive necessary change

Master all this, and you're well on your way to creating the most important thing a leader can provide: the context for people to do their best work.

Jim Whitehurst is President and CEO of Red Hat, the world's leading provider of open source enterprise IT products and services, and author of The Open Organization.

An open leader's guide to better meetings

Angela Robertson

Several years ago I heard an anecdote about meetings that I'll never forget: A company once kept a scoreboard calculating the cost of a meeting by multiplying the number of people in the meeting by the number of minutes in the room—then displaying the result. The question everyone needed to consider: Was the impact of the meeting worth the cost?

Often branded as unnecessary, poorly led meetings can be a tax on time and distract from core priorities. For that (and many other) reasons, meetings are controversial.

Nevertheless, developing relationships with employees, peers, stakeholders, customers, senior leaders, and others has tremendous value. And we develop these relationships through meaningful interactions. Led well, meetings force us to develop these critical relationships and serve as accountability tools.

So what's the difference between an unnecessary meeting and a valuable one? In this chapter, I'll explain how we can we leverage open principles to experience more of the latter and fewer of the former.

Successful meeting basics

Hosting and leading meetings is a skill. I forget that regularly, usually expecting everyone to be effective at hosting meetings. So let's start with the basics for effective meetings.

Meetings need a clear goal. You can identify a meeting's goal by answering a simple question: "Why are we meeting?"

After you've articulated the goal of a meeting, you'll need to identify who needs to *attend* the meeting. Invite those people to attend at a time that fits their schedules. If you're meeting when people are distracted (for example, asking people to call in for a meeting at 7:30 a.m. when they are driving to work), then pick another time. You want attendees engaged because you need people to have a sense of accountability for meeting outcomes and next steps.

Along these same lines, keep a record (minutes) for meetings, so you have a log of what everyone at the meeting discussed, decisions you still need to make, etc.

Again, the first step to leading a successful meeting is *deciding the goal of the meeting*. In general, meetings fall into one of the following categories: *administrative, tactical, strategic, developmental, and personnel*. But the specific *type* of meeting you host depends on the goal of the meeting. Common types include:

- Daily standup (administrative)
- Team meeting (tactical)
- Decision-making (strategic)
- Learning (developmental)
- Brainstorming (strategic)
- One-on-ones (tactical)
- Delegations (tactical)
- Performance reviews (personnel)
- Skip level (strategic)
- Off site (developmental)
- All hands (administrative)

In this chapter, I'll briefly discuss each of these meeting types. Articulating a meeting goal helps you determine your meeting type—and determining your meeting type in turn helps you determine the meetings mechanics (how you'll run it, where you'll run it, who you'll invite, and so on). Some meetings also combine some of these types into a single event. For example, team meetings can combine learning, brainstorming, and decision making.

After you've identified the type of meeting you're leading, set the agenda and send it in the meeting invitation. Also state your expectations for participation. If you're hosting a meeting online, for instance, do attendees know if video is required? Will the meeting be recorded? Make sure these expectations are clearly positioned in the invitation.

At the end of the meeting, then, recap the action items people have taken and the time frame (or date for a date) for following up on them. Share expectations both verbally and in writing.

As a leader, you can infuse open principles into every type of meeting you'd like to hold. Let's examine how.

Daily standups

Daily standups are familiar to anyone practicing the Agile development model. They're brief meetings where everyone collaborating on a project reports three facts:

1. Work completed since last stand-up
2. Work in the queue
3. Risks/blockers

The group can also opt to add a post-meeting discussion. Given this meeting's tight scope, the post-meeting discussion is time devoted to questions and answers sparked during the standup. For example, in the standup, a team member might identify work completed and work in the queue (items 1 and 2) as bugs (defects). Likewise, the risk (item 3) might also be bug-related. The person speaking can request a post-meeting discussion to review the risk and not exceed the scope of the standup.

The stand-up meeting is an excellent example of meetings done well: Tightly scoped and reliably brief with accountability for all involved. These meetings truly drive accountability. With just 10 minutes every day, project leads quickly assemble the team to hear three things from each attendee.

If you're a project lead, then these meetings are an indispensable tool for you. They afford a degree of transparency that allows leads to know exactly where team members are spending their time. Everyone is invited to contribute in the same way, so it's an inclusive gathering that gives equal opportunity to contribute and listen. I find that listening leads to collaboration, too, as I can build on the work others outline in a standup. I've led standups, and I love that the short meeting focuses the team on achieving the sprint goals so we have impactful work to share in the end-of-sprint demo.

Team meetings

Daily standups are often run by *leads*. Team meetings are hosted by *managers*. Managers use team meetings to keep their teams (that is, the people reporting to them) focused on core priorities.

In open organizations, teams need to be committed to shared priorities. Team meetings are opportunities to reinforce that commitment. They offer regular checkpoints for accountability. Managers with lingering questions or concerns about a team's ability to understand or achieve core priorities after one-on-one meetings can raise those concerns during team meetings.

Team meetings (like all meetings) can be transparent. Unless there's some risk to an employee's privacy or some other legal concern, managers should consider sharing the meeting agenda, meeting minutes, and resultant action items. New team members can learn from these records. Absent team members can catch up quickly. And you'll have the benefit of the written record available when your memory doesn't recall all of the details.

Decision-making

The most important thing you need to do in a decision-making meeting is to ask for a decision. I state that fact first because it's easy to hold a meeting like this and *not* ask for a decision.

Decision-making meetings occur in time set aside to share updates on an assignment, and you should always *begin* the meeting by stating that you wish to arrive at a decision by the *end* of the meeting. For example, if you've been asked to lead a vendor program, then, beginning with your proposal for work, set aside time for an update and include the fact that you expect a "proceed or pause" decision at the end of the meeting. In advance of the meeting, summarize why a vendor program is necessary, what success looks like, and what you need to proceed. Share this information in a written document and allow time for a review of the material at the start of the meeting. Always grant enough time for questions and propose that you have enough information to proceed with the task. Then ask if anyone has objections.

If no one objects to your proposals, state your next steps and timeline. Then follow up after the meeting with a written statement of how you'll proceed. You should also be clear about whether a project isn't going to proceed. I share that observation to remind you that you don't need to be dogmatic in favor of any particular meeting outcome.

In these meetings, be transparent about your point of view and be passionate. If you learn that the organization is not ready to go in a particular direction, *let it go*. You're leading a community of people. You don't need consensus, but you need the team motivated to go in the direction that you're leading with the decision. Adapting so you don't force a change on a group of people when you lack adequate support is wise in situations where you can take what you've learned and assess the best way to move forward.

Learning

The idea behind the learning meeting is simple: Someone has information that you want shared with a group of people, so you hold a meeting to facilitate that sharing. People like to hold them over lunch, which is why you'll often hear them called "brown bag" meetings.

Always begin these meetings by stressing the fact that you don't need a decision to result from the meeting. If you work in an organization with a cultural bias for action, then setting aside time to *just learn* can be challenge. One way to counter this need to act is to give everyone a reason to act before the meeting.

For example, if you want to focus on why a specific support issue occurred, then ask every team to prepare for a root cause analysis of their biggest support issue in the past week. Explain that at the start of the meeting you'll randomly select a team to share their analysis. The other teams in attendance can learn from the selected team's experience. That way, in preparation for the learning-focused meeting, every team has acted to prepare.

When structuring these meetings, think carefully. "Brown bag" meetings are often optional meetings. If you want attendance to be mandatory, use something like "A deep dive into *topic name*." In the description for the meeting, explain that a presenter will be sharing information for the purposes of learning and that questions are welcomed. You want attendees to learn more about the topic so you're taking the time to organize the session. The meeting leader should introduce the speaker, facilitate the discussion, and ensure someone attending the meeting handles the minutes.

Learning meetings are a great time for people to voice conflicting viewpoints and ask probing questions. If your organization tends to be conflict avoidant, you can ask people who you know have different points of view to share their perspectives. You want to draw out different ideas so your team can be more creative. These meetings can also function as morale boosters for a team. When a leader sets aside time for a team to to learn, employees see an investment in their base of knowledge.

Depending on the discussion that occurs during the learning meeting, follow-up work varies. Often several team members find the material something worth pursuing further, as it relates to core priorities, and they take action items. If the discussion yields learning but additional work is not helpful in meeting core priorities, then team members have the information for future reference.

Whenever possible, record and share all information with the larger organization. Transparency develops trust and allows open organizations to grow.

Brainstorming

Sometimes you have a problem to work through and you need time to catalog options for solutions. Set aside time for a working meeting to review ideas with co-workers.

Ideally, you'll have everyone physically present in the same room when brainstorming. But even if everyone cannot be in the same room, I find that you can still have an effective brainstorming session as long as the team understands the rules for communication. As a leader, you should be clear about questions like:

- Who is leading and facilitating the discussion?
- Who is taking notes?
- How is the team going to share the ideas sketched during the discussion?

Brainstorming meetings require some pre-work to ensure the meeting time focuses on the work. You can ask people to come prepared with specific pre-work completed. Depending on the challenge and the time available, you might have people come with specific examples ready to share to get the brainstorming session started. You can limit pre-work to reading a problem statement.

In most cases, you'll want people to complete some kind of pre-work to ensure that your attendees are the best group of people to have in the meeting. Encourage questions so everyone has clarity around why the brainstorming session is necessary. When people have clarity, they feel motivated to act and you want your team to come ready to engage transparently, leaving ego at the door in the service of developing the best ideas.

At the start of the meeting, the lead kicks off the brainstorming session and facilitates the discussion. The lead is responsible for getting all team members involved in the discussion. Remember that people's personalities vary. Extroverts are going to talk; you need to make sure the quieter meeting attendees are invited to participate in a meaningful way. You don't want people thinking, "I'll talk to check the ‘I participated' box." You want everyone to engage for the best outcome in the brainstorming session. Diversity of thoughts and ideas leads to the best outcomes.

Depending on the deadlines associated with the project, after the brainstorming session you can plan next steps. Again, share a summary of the meeting and include who took what action item. Your team will need specific deadlines if it can continue making progress.

One-on-ones

One-on-one meetings help open leaders drive strategy, and allow them to receive and deliver candid feedback at quicker intervals—crucial for teams that are always working in "release early, release often" mode. Employees are always making decisions that impact people who use whatever we're working to deliver. So the one-on-one meeting naturally covers the priorities we're setting, a discussion of the impacts those priorities have, and the risks associated with those priorities. These meetings tend to be tactical, lasting about 30 minutes and occurring roughly once per week.

To ensure transparency during one-on-ones, open leaders ask plenty of questions for clarity. Explain that what helps a manager become a *better* manager is knowing what's blocking a team's work or what questions are most pressing for them. By asking questions and giving transparent answers as a manager, you're finding space to learn more about your team members—things like:

- What are they working on beyond the work assigned?
- What problems are they solving?
- How are they deciding what work not to do?
- What do they need to have unblocked in order to make faster progress?

In the end, however, in one-on-one meetings leaders should listen more than they talk.

Everyone handles one-on-one meetings differently. But in general, successful one-on-one meetings should address items that fall into two categories:

- **Priorities and risks.** For managers and team members, it's easy to think that things are going well, but there are often challenges. People want to give off an "I've got it all together" vibe to insulate themselves from risk. The thing is: Work is risky. Most jobs involve work that's ambiguous and uncertain. So make sure you don't forget to discuss risks.
- **Roadblocks and learning.** Often, certain things prevent us from moving our work forward—so managers need to know about those things in a precise and candid way. Even so, we can't always until we have everything we need to proceed with a project. We can work with a growth mindset so we, as a collaborative team, can share what we learn from mistakes and new information.

The more trust and credibility a manager has earned with a team, the quicker team members can adapt to changes that are necessary for the business. For example, while a manager might not be able to answer every question that arises in a meeting, she can encourage curiosity. When dealing with ambiguity, identify people who want to answer similar questions and connect them. As you see people who don't know what success looks like, use the meeting to bring clarity to goals as much as you possibly can.

Delegations

Delegation meetings occur when leaders need help meeting all their strategic priorities. But open leaders understand something additional: Delegation is also a way to empower those around you—to build, in other words, *a culture of shared responsibility*.[27] Through our adaptability, then, delegation becomes all the more possible—indeed, almost inherently essential—for the organization to thrive and grow. And the challenge that often makes delegation difficult is *trust*. If you cannot think of anything to delegate, perhaps you believe that you cannot trust your team members to share your responsibilities.

When delegating work, you'll be helping team members make decisions regarding *their* priorities and understand how *they* might delegate work or stop work on a task altogether. When you approach a prioritization discussion with someone on your team, talk about the work the employee doesn't want to stop doing. You want to begin here, because you need to know what your teammate has *difficulty letting go of* as change occurs during the delegation.

As a leader, you motivate people to change. If you need the employee to stop doing the very thing that he or she loves doing (and finds great value in delivering), you need to speak to this concern. With some discussion, the team member adapts and sees the strategy behind what's motivating you to push for change.

1. You might use these steps to structure this prioritization exercise:
2. State the work being delegating and seek confirmation that the delegation has been accepted.
3. Inventory the work that the employee is tasked to complete.
4. Ask the employee to give each work item a priority and deadline.

27 https://opensource.com/open-organization/18/7/guide-to-delegation

5. Using your knowledge of the business strategy and customer commitments, collaborate to establish priorities.
6. Put the priorities in writing, identify quality standards, and set deadlines.
7. Set expectations regarding status updates, and confirm you both understand how the employee's current workload adapts with the new work and deadlines.

Always understand that your goal in these meetings is empowering another person to do the work. With any act of delegation, you're letting go. In that act of letting go, you have space to pick up whatever work requires your attention.

Performance reviews

Most organizations have a regular cadence for performance reviews. Ideally, managers leading openly are communicating performance feedback as micro-feedback and these meetings contain no surprises.

If performance is poor and an employee is in the wrong role, employees often do not hear the constructive feedback they require to start acting in a way that improves their performance. The performance review (which often includes a discussion of compensation) is a time when employees who have been in denial about poor performance finally hear the "things need to change" message.

Performance reviews are communicated in writing, so a performance review meeting is a discussion about the written feedback. Before the meeting, give employees time to read your written comments. Explain that after the meeting you intend to submit the comments as part of the employee's record so you need the meeting to be a productive discussion. If there's any dispute, the dispute needs to be surfaced succinctly so action can be taken.

Employees need not *agree* with the performance review feedback (given that the manager is responsible for assessing the employee's performance). But if there's a disagreement about the assessment, use fact-based written documentation to work through the issues. The written documentation makes the exchange more transparent and everyone has the opportunity to provide input.

Skip level

Skip level meetings occur when an employee meets a manager's manager. In these cases, the more senior manager does not drive the conversation. Time allotted for the meeting is time for the organization's leader to listen and learn. Employees receive clarity as the senior leader provides context and asks questions to gain perspective.

As an employee meeting with a senior leader, come prepared with some questions or topics for discussion. Send these topics in advance to give the senior leader some idea of what you want to discuss. If you send topics via email in advance, don't assume anyone read them. Everyone has unplanned events steal time away from planned activities (like preparing for a meeting). Senior leaders can also come prepared with questions.

What type of questions do senior leaders want to hear? First and foremost, ask them how you can help them be more successful. Senior leaders are expected to execute on a strategy. Your help is essential for implementing that strategy. Anything you can do to assist with that is valuable, and your curiosity about ways you can help is guaranteed to be impactful.

One final note about skip level meetings: Senior leaders are often curious about "what's really going on" in their organization. If you're concerned that a senior leader needs to know something that they seem unaware of, bring up the topic. If the leader is listening, she'll ask for your candor. Some people have told me that nothing is "off the record." I argue that this really depends on the leader. Personally, I respect off-the-record disclaimers and appreciate the transparency people are willing to bring to a skip-level-type meeting.

Off-site

Teams benefit when they plan some time "off-site" to identify core priorities. They often occur on a quarterly basis "Off-site" is a term that needn't *literally* mean "off the premises." For example, if you have a distributed team, meeting "off-site" does not automatically mean traveling. Don't let location issues deter you: Set an agenda and hold the meeting.

The goal of the off-site is to get a fresh perspective on what's really important for your business to succeed and grow. You want to refresh your view of core priorities as the customer's needs and the broader organization's business priorities are likely changing. It's cliché but it's true: We're always learning. Take what you and your team have learned over the previous three months and agree on the core priorities for the next three months.

The goal of an off-site meeting is not *consensus*. You are not going to get every person to agree on the same set of priorities. You want the team to collaborate on a set of core priorities that they verbally commit to *work toward*. Verbal commitment on core priorities is essential.

As an open leader, you need to know that your team is going to support the strategy. If you hear any hesitation or doubt when you ask for a verbal commitment, ask for clarification. Your goal is not to force commitment; your goal is to get people to the point where they commit to the team's statement of core priorities, leave the meeting to explain the priorities, and start implementation work.

Off-site meetings are successful when attendees are vulnerable with each other about their concerns and engage in conflict-heavy discussions. As such, a team might not share all details as transparently as they share details from other types of meetings. But I encourage transparency here, because it gives the larger team perspective about the thought and candor that went into the discussion. That said, however, airing dirty laundry isn't helpful when you want the larger team focused on asking clarifying questions about the strategy and working out tactical details for implementation.

All hands

All-hands meetings are an opportunity for the organization's leader to gather other leaders in conversation. It's also a perfect opportunity to practice transparency.

If you're the leader planning the meeting, talk with people in the organization to find out what questions are at the top of everyone's minds. Think about other topics senior leaders in the organization have shared and how you can add detail that helps people understand why the team needs to act on behalf of whatever strategy the team is being implemented.

Open leaders bring others into the conversation. Get a range of people involved: Invite people who are in the organization to speak and ask partners of the organization to speak on relevant topics. Facilitate a question-and-answer session after each main topic.

Also take time to recognize great work by individuals and small teams. Ask the larger organization to nominate people on the team who are delivering high caliber work on behalf of customers. When you receive submissions, if one part of the organization seems heavily weighted, seek balance. Perhaps the imbalance comes from one team feeling unengaged or overwhelmed. The leader can ask why one part of the team is well represented while other parts of the team seem non-existent.

After you have a representative sample of the great work the team is recognizing, decide what is the best example to highlight. Again, seek to balance representation in the public recognition. You want the team to understand that they have something to learn from each other.

As you're used to reading by now: Record and share.

Conclusion

Some people are going to push back against meetings, calling them "time sucks" (or worse). Ignore these assertions and prove the worth of the meeting by making it useful for the attendees. If you don't find the meeting to be a good use of time, cancel it and evaluate how you can restart the effort to reach your desired outcome. You'll find people appreciate your willingness to execute on the strategy despite challenges.

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Chapter title

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Part 3:
Motivation & Engagement

Let engagement lead the way

Chad Sansing

When we talk about Internet health—or a healthy Internet—we're talking about several interrelated issues: privacy and security, openness, digital inclusion, web literacy, decentralization, and how to leverage these issues for good on behalf of the Internet and its users. The Internet is like an ecosystem that needs all of us pulling together to maintain its health and sustainability.

And that ecosystem needs leaders. More specifically, a healthy Internet needs *open* leaders.

Open leaders design and build projects that empower others to collaborate within inclusive communities.

That's the core belief of the Open Leadership and Events (OLE) team at the Mozilla Foundation. In our work to spread the principles, practices, and skills of open leadership, we aim to design and build programs that empower participants to take the lead on open projects about data, Internet health,[28] and the impact those things have on both their local and distributed communities. We serve leaders from around the world and across a wide range of open, for-profit and non-profit, and technical and non-technical projects.

Participants in OLE programs come from all over the open ecosystem; they include people working on open data, open edu-

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28 https://internethealthreport.org/

cational resources (OER), open government, open hardware, open science, open software (F/OSS), privacy and security for open practitioners, and more. For example, in 2018, Mozilla' Global Sprint (a 2-day marathon of contribution to open projects) included projects and communities like these:

- Rust
- P5js
- Reading for Gender Bias
- Mission: Information
- Wikipathways

As we support a diverse set of open leaders like these—and collaborate with them to increase the breadth and depth of open's impact on the world—we're especially concerned with engagement and understanding the life-cycles of our participants' relationships with Mozilla and openness in general. We believe that one way to improve our work and better align it with participants' wants and needs is to *follow their lead*. Where do they begin their relationships with us? What kinds of events and trainings bring them to us? What are their typical next steps after a first engagement? In what kinds of participation do they engage over time, and do those engagements always deepen? Do people contribute more or less to us as we invest more in them? What are our returns on both high-touch and light-touch programs, and are those returns equitable for participants? What do they get from us in the value exchanges that underlay our community interactions? Do they consistently "graduate," so to speak, to run their own projects or programs after event X or training Y?

To put it another way: How can following our participants' patterns of engagement lead us to better understand and improve our work in supporting them?

To answer that question, we started building a participation index (PI) called the "Mountain of Engagement" (MoE). The MoE is meant to be both a methodology and measurement tool for defining and tracking meaningful interactions with our team so that we can follow individuals and groups of participants and surface patterns in their engagement with OLE programming. Those patterns help us identify our most and least successful programs. From there, we can make decisions about how to improve our work.

We want to help open leaders find helpful pathways to professional development and success in their own organizations, projects, and communities. We also want to improve our programs to make sure we are meeting community members' needs.

This is the story of how we developed the MoE to help us do those things. It's also the story of what we've learned so far and what we might do next. We hope that by following a similar methodology, you can develop a participation index unique to your organization that helps you strengthen its engagement with open leaders in your community.

Project DNA

Our MoE drew inspiration from the Total Engagement Index (TEI). In 2017, the advocacy team at the Mozilla Foundation developed the TEI and its dashboard in order to track how people on our mailing list interacted with emails and other campaign channels. Vojtech Sedlak and Brett Gaylor led the work at Mozilla in consultation with Harmony Labs. The MoE is also an extension of the well-known pyramid of engagement developed by Groundwire.[29]

The TEI grouped engagements into different bands or categories of action by depth of involvement. Each engagement in a particular band added a certain number of points to the TEI, and the advocacy team tracked the total engagement points it earned each month on an internal dashboard.

The TEI used these bands to group different kinds of engagements:

1. **Owning:** Actions taken by allied individuals and organizations to promote Internet health, like launching their own Internet health campaign or project
2. **Leading:** Actions taken to partner with Mozilla on Internet health issues, like partnering on a campaign or event
3. **Contributing:** Actions taken to support Mozilla's Internet health work, like donations, project contributions, and amplifying Mozilla content on social media
4. **Endorsing:** Actions taken to spread Mozilla's Internet health work, like signing petitions and liking and sharing updates on social media
5. **Observing:** Actions taken to learn about Mozilla's Internet health work, like visiting a campaign website or opening a campaign email.

An **Observing** engagement might have earned the team a fraction of a point, while each **Leading** or **Owning** might be worth a full point on its own. By totaling the scores of every en-

29 To get a sense of similar methodologies, visit Groundwire's Engagement 101 Series: http://groundwire.org/labs/engagement_101_series/index.html

gagement in a given month, the advocacy team could track an aggregate score representing its impact.

The TEI is no longer a primary inspiration for the foundation, but it gave the OLE team a framework for examining our own work and identifying the key forms of participation and engagement we want to track across our year-long cycle of leadership trainings and events from our Open Leaders program through the Global Sprint and MozFest. Our work also draws on research from Mozilla's Open Innovation team, which explores being "open by design" and fostering community interactions and value exchanges in open projects.[30] Other key elements of the MoE come from team members' experiences with open science initiatives, working open workshops, web literacy trainings, research done for the Open Leadership Framework,[31] and Mozilla's work to champion openness as an Internet health issue.[32]

Developing a Mountain of Engagement

What follows is a description of the steps we took to develop our MoE. This is an intentional, mindful methodology we developed especially for smaller projects and communities that need to track engagement differently than a traditional, technical analytics team does. We hope that by following a similar process, you can identify the types of engagement that matter most to you and your participants. Once you know which engagements matter most, you can work to improve them and better scaffold pathways between them.

30 https://medium.com/mozilla-open-innovation/

31 https://mzl.la/olf

32 https://internethealthreport.org/2018/category/openness/

First we asked: *What do we do?* We wanted to synthesize and capture a holistic view of our work taken from each team member's perspective to minimize the chance we'd overlook something important that we do, albeit infrequently or implicitly. We identified major programs like Open Leaders,[33] the Global Sprint,[34] Open Science mini-grants,[35] and MozFest,[36] as well as less visible pieces of work like developing curriculum, maintaining a social media presence, researching open leadership practices, and speaking at conferences.

Then we asked: *How do people engage with us?* Looking at all we do, we listed the different types of engagements people could have with each area of work. For example, someone might be an attendee, facilitator (presenter), or wrangler (organizer) at MozFest. Someone else might follow one of our social media accounts, retweet or share a post, or clap for a blog.

Next, we asked: *How might we band, group, or sort these types of engagements?* We decided to use these tiers and descriptors:

1. **Leading:** A high-touch relationship; we maintain relationships and co-branded events and trainings with alumni and allies to increase the impact, prestige, and reach of both parties' work.
2. **Collaborating:** A high-touch relationship; we offer professional development through our own events in return for co-creation, localization, and spread.

33 http://mzl.la/openleaders/

34 https://mzl.la/global-sprint

35 https://science.mozilla.org/blog/2018-mini-grant-rfp

36 http://mzl.la/mozfest

3. **Participating:** A high-touch relationship; we offer community management and professional development through our own trainings and events in return for soliciting ideas & learning through use.
4. **Endorsing:** A low-touch relationship; we share information with people who gain social capital by spreading it and networking with others who share common interests.
5. **Learning:** A low-touch relationship; we gift resources like open curriculum and get back aggregate data (like downloads, registrations, and views) showing people use our resources and pay attention to us.

After that, we asked: *What does our Mountain of Engagement look like?*

Figure 1 shows the graphic we made to illustrate our MoE.

Figure 1

The OLE team's MoE, CC BY 4.0 by Mozilla

Once we had our visualization of the MoE, we asked: *How can we operationalize this or make this more useful?* In response, we developed a summary document (Figure 2) that helped us connect each band to examples, scores, and the types of community interactions and value exchanges that might show up within each level of engagement.

Level	Examples	Value exchanges	Measures	Weights & multipliers
Leading	Global Sprint project leads, MozFest wranglers; grant PIs, fellows, MozHouse partners.	High touch: We maintain relationships to increase the impact, prestige, and reach of both parties' work.	Co-branding, exchanges, MoUs, participation in each other's events, partnerships, sponsorships, MozHouse.	5 points per interaction; x2 points for programming in an area of strategic focus.
Collaborating	WoW co-facilitators, Open Leaders mentors, MozFest facilitators and volunteers, Global Sprint site hosts.	High touch: We offer professional development (PD) in return for co-creation, localization, and spread.	Communications, contributions, documentation, forks, PRs, remixes.	1 point per interaction; x2 points for facilitating an opportunity in alignment with an area of strategic focus.
Participating	Open Leadership Map contributors, Open Leaders participants, Global Sprint contributors, MozFest attendees, episodic help.	High touch: We offer community management & PD in return for soliciting ideas & learning through use.	Activities, applications, attendance, contributions, participants, surveys.	.5 points per interaction; x2 points for participating from an audience aligned with a strategic focus.
Endorsing	People who RT tweets, share Facebook posts, claps on Medium, sharing RFP & CTA.	Low touch: We share information with people who gain social capital by spreading it and networking.	Claps, comments, fans, posts, reposts, RTs, shares, tweets, updates.	.25 points per interaction; x2 points for each endorsement localized by language.
Learning	Social media followers, GitHub followers, OL 101 completers.	Low touch: We gift resources, and get back data showing people use our resources and pay attention to us.	Completions, downloads, enrollments, followers, referrals, subscribers, views.	.125 points per engagement; no multipliers.

Figure 2

Summary chart of the draft OLE MoE, CC BY 4.0 by Mozilla

In the same document, we experimented with multipliers that aligned with our team and foundation's goals. For example, if were especially interested in engagements from particular places or groups of people, we might double their scores to draw our attention to their engagements and the pathways they took between them.

We wanted to know:

- What works and what doesn't work for different groups of participants.
- How participants move from one engagement to another or get stuck between them.

- How we might systematize the ways we recognize participants and invite them to deeper levels of engagement with us over the lifetime of our relationship with them.

With those prompts in mind, we asked ourselves: *Where should we focus our attention?* Given our capacities, goals, and interests, we decided to focus on engagements at the **PARTICIPATING**, **COLLABORATING**, and **LEADING** levels of the MoE. While we blog and tweet and send newsletters, most of our time is spent designing, implementing, and improving high-touch open leadership programs like Open Leaders, the Global Sprint, and MozFest. We worried that tracking tweets and retweets and likes and opens would distract us from supporting those programs and their participants, especially since we were piloting and testing this approach before importing it in to a customer relationship management (CRM) tool. Although we're curious about how our participants reach the **PARTICIPATING** level in the first place, we think we can ask them about their journeys as they move up the MoE; we don't need to follow them from the first time they visit our website.

Furthermore, we don't compile an aggregate score like the TEI did; instead, we follow individuals' scores and reach out with specific communications and invitations to people and groups that cross different thresholds of engagement with us. For example, we might send an invitation to get involved with a program or event at the **COLLABORATING** level to anyone who earns 5 or more points at the **PARTICIPATING** level.

By giving most of our attention and time to participants higher up the MoE, we can empower them to co-create programming with us and then launch their own communities, organizations, and projects in support of Internet health.

And that is where we are today.

We're listening to people who participate in programs like Open Leaders, the Global Sprint, open science mini-grants, and MozFest so we can improve those offerings, clarify the pathways between them, and empower alumni to launch and sustain their own open Internet health projects in the future. Our ongoing question is: *What do we do with the data we collect?*

While you and your community, organization, and project might be more concerned with another part of the open ecosystem—such as data, government, or software—we hope that this process (and the questions it raises) will help you understand when, where, and how to empower your participants to broaden and deepen their engagement with you and the interests you share.

To summarize, here are the questions we asked ourselves while developing the MoE:

- What do we do?
- How do people engage with us?
- How might we band, group, or sort these types of engagements?
- What does our Mountain of Engagement (MoE) look like?
- How might we operationalize this or make it more useful?
- Where should we focus our attention?
- What do we do with the data we collect?

Early experiments

First, a quick note on data: you should follow all the laws, policies, and rules that cover data collection, retention, and use for you and your participants. We always encourage people to adopt data privacy policies that are as strong as Mozilla's.[37]

37 https://www.mozilla.org/en-US/privacy/websites/

Let's take a look at some early data analysis we've done of participants' engagements with OLE programs during the first half (H1) of 2018. We want to share these observations to suggest how a MoE might help lead our team—and yours—answer new questions and develop new pathways and programs to support participants.

In looking at the 1,954 participants who completed an engagement with us between January and June, 2018, we found that:

- 65% came from outside the United States (US) and a "virtual" participant group (for which we have not geographic data).
- 61% completed an engagement at the Participating level of our MoE.
- 61% participated in the 2018 Global Sprint.
- 6% participated in cohort 5 of our Open Leaders program.
- 5% participated in our open science mini-grant application process.

Engagement data like this can lead us towards:

- Confirming or correcting our ratio of participants from the US and from outside the US so we can sustain or develop inclusive, global participation from diverse communities in our programming. We can also shift strategic focus to look at engagement from groups within the US whom we have not yet effectively or sufficiently invited and welcomed into these programs.
- Confirming or correcting our ratio of **PARTICIPATING** engagements and engagements at other levels of the MoE to establish a baseline or

benchmark for growth in **COLLABORATING** and **LEADING** engagements.

- Examining the similarities and differences between audiences and opportunities across programs to apply best practices, as well as audience-specific invitations, to all of our trainings and events.
- Investigating why discrete projects—like developing the Open Leadership Framework— engage far fewer participants than on-going programs do.

We also looked at participation and scores from all participants who completed 2 or more engagements with us during the same time period. We found these outcomes:

- 6% of total participants engaged with 2 or more OLE programs at the **PARTICIPATING** level or higher in H1 of 2018.
- 71% of these participants came from outside the US.
- 76% participated in the 2018 Global Sprint.
- 53% participated in cohort 5 of our Open Leaders program.
- 17% participated in our open science mini-grant application process.
- 4% participated in all 3 programs.
- 54% participated in the Global Sprint and Open Leaders.
- 7% participated in the Global Sprint and open science mini-grant application process.
- 1% participated in Open Leaders and the open science mini-grant application process.

Here we might ask ourselves how participants move between programs and how to encourage more consistent engagement across multiple programs. Is there a way to connect the open science mini-grant application to another program or sequence of programs? Are there pieces of invitation to the Global Sprint and pieces of support for participants that we can adapt for other programs? What motivates participants to engage in multiple OLE programs? What makes the combination of Global Sprint and Open Leaders so popular with repeat participants?

With the MozFest 2018 and the 2019 Global Sprint coming up later this year and early next, we can return to these questions with new data and a larger sample of participants and engagements to help us answer questions like these.

A story of engagement

Looking back at the last few years of engagement data we have for our Open Leaders program, we found a drop off in how many past participants returned as mentors for new participants in the next cohort. Between rounds 1 and 3, that conversion rate went from 70% down to 55%. The number of open leaders willing to stick with us and to move from the participating band of our MoE to the collaborating band dropped by double digits.

However, by paying attention to that pathway of engagement in OLE programming between **PARTICIPATING** (being a mentee) and **COLLABORATING** (becoming a mentor) on the MoE, we were able to identify this problem quickly and work to keep more participants engaged between rounds 3 and 4. By adding additional mentor training as a form of professional development and support for returning participants, we brought the percentage of past participants willing to stay on as collaborators back up to 72%. However, as we continued to develop and grow the program, that number dropped back down to 50% when we looked at participants from cohort 5 who returned as mentors for cohort 6.

Something is happening as we scale up the number of participants in the Open Leaders program. By using our MoE to focus our attention on key results like the pathway and conversion rate from participant to mentor, we can respond to issues like these and calibrate our work to fit our leaders' needs. We can also see how many participants submit a proposal to MozFest or return to the next Global Sprint and ask whether or not these opportunities take the place of continued engagement with Open Leaders for some participants.

Maybe becoming a mentor isn't the best fit for continued engagement after participating in Open Leaders. Or maybe becoming a mentor is the best fit for continued engagement after participating in a different offering. The MoE gives us the opportunity to consider such possibilities and to look for successes and challenges across our programs.

As we iterate on that mentor training further, our goal after cohort 6 is a 90% conversion rate. By refining our programs, we can make each one better at graduating participants to the next level of our MoE and then, ideally, out into the Internet health movement as the leads of their own communities, organizations, and projects.

Next steps

Paying attention to how people engage with us helps us improve our programs, clarify the pathways between them, and refine invitations we share to participate in them

You might use your own Mountain of Engagement—and the data you collect through it—to set similar goals for your community, organization, or project.

In pursuit of a world-class open leadership program, we let engagement lead the way. We want to empower participants to shape our work according to their needs and in support of a healthy Internet for all.

Chad Sansing is a curriculum manager at the Mozilla Foundation. Prior to working on the Open Leadership and Events team, he developed Web Literacy curriculum for the foundation. He joined Mozilla after teaching middle school English, social studies, and technology for 14 years. He is passionate about Internet health, facilitation, games, and helping non-technical audiences understand the advantages of working open and practicing open leadership, especially in libraries, schools, and other community learning spaces.

When empowering employee decision-making, intent is everything

Ron McFarland

In Japanese business discussions, one term appears again and again: "gemba." Over many years living and working for Japanese companies, I've probably heard the phrase "gemba de kimeru" a million times. Basically, it means that issues must be solved and decided on the front-line, where the problems and/or opportunities are. Popular thinking holds that people can work with their peers to solve problems. In Japan, however, problems with this thinking can develop.

Here, top managers often don't want to "stick out." They don't want to assume too much responsibility. So they pass decision-making "down" to front-line people, essentially removing themselves from the decision-making picture. They don't grant front-line employees decision-making power in order to empower them. They do it to avoid responsibility for failures.

As Jim Whitehurst says in *The Open Organization*, granting front-line employees more autonomy is a way of driving innovation—not avoiding culpability. Jim describes the ways Western managers struggle with the issue of autonomy (they fear letting their staff make decisions, as they think that by doing so they'll lose organizational power), but they miss this critical intercultural difference. (Interestingly, if managers stay involved in supporting roles and believe that front-line people can make decisions on their own, they can actually become more powerful. But that's another article.)

Managers should stay involved in critical decision-making, even as they grant their front-line employees a bigger voice in decisions. But their role needs to change. As Whitehurst says in The Open Organization, they need to facilitate, not delegate. That's a critical distinction that my time in Japan has taught me.

It's also shown me one source of this problem—as well as a few paths to fixing it.

In need of meritocracy

When managers ask their staff to make decisions, then divest completely from the decision-making process, they can actually reveal their own weaknesses. I've seen engineers transferred to high level, personnel-related department positions, for example. These transfers were not based on ability or experience, but simply on title and the number of years of experience they had in the company. Promoted candidates unfortunately tend to lack managerial skills and sensibilities (after all, they were trained as engineers). So to make sure the department is functional, these newly-minted managers have to rely heavily on their staff. We in the department were shocked by this, and prayed that incoming managers wouldn't weaken our departments too greatly.

Interestingly, however, I've seen some success in this uncomfortable working environment. Quite simply, the manager announced he didn't feel he was fully qualified for the position, and that he would need all the staff's support to be successful, particularly from those who have been in the department for many years. Admitting one's limits actually helps build engagement.

Peer projects can begin at parties

Japanese company parties always feature an emcee, who announces the start of the party. Imagine a party to welcome the unqualified boss I mentioned above. Typically, people are sitting around a large table, and initially there is only one discussion going on (one the emcee controls). The emcee welcomes everyone and asks someone to give a toast ("kanpai") to begin the boss's welcome party. From that point on, people start eating and drinking. Then the emcee asks everyone to introduce themselves, both to the whole group and to the boss, and to mention some of the things they're working on. After all participants have introduced themselves, the new boss speaks.

In my experience, the unsuccessful inexperienced bosses announce how they'd like to improve the department. The best unqualified managers simply present their career highlights, then mention that they're looking forward to getting to know and working with everyone. When general conversation resumes, the new manager actually moves around the room, pouring beer in each associate's glass, offering an individual greeting. At that time, the manager asks about each member's most urgent concerns with the intent of finding a way to genuinely understand them. Armed with what they've learned at these parties, these inexperienced (but smart) managers begin finding ways they can be helpful. Rather than just announce a plan to make changes, they spend time trying to understand what their employees need to have changed.

With the right introductions, questioning, and ideation, critical peer projects can begin during those parties, whether through the boss's introductions or close colleagues just kicking ideas around. These type of parties are not just for new employees (or new bosses). Many Japanese companies have these parties with subsidiaries, vendors, and customers with the same goal. They really generate front-line projects to explore partnerships as well.

Meetings in the bars at night

But occasionally official company parties are not the best environments for speaking freely and openly, particularly regarding uncomfortable issues. On some delicate subjects, I have been more successful holding peer-to-peer, open discussions after those parties.

I ask a few attendees to grab a beer or two at a yakitori restaurant after the party. The people I select for these meetings usually demonstrate the desire to make improvements (as opposed to those wanting to maintain the status quo). I also select people that take pride in their work, will be accountable for performance, and have proven they've got the skills to introduce important changes. With that environment and small group size, those discussions have been very successful for me, and I think that environment is the best venue for creative open discussions throughout Japan.

Finding a balance

Whether you're putting together peers at a formal business meeting, at an official boss's welcome party, or in a bar, I can't stress enough the importance of balancing the four criteria Whitehurst explains in *The Open Organization*:

1. Encouraging members to speak freely and honestly
2. Encouraging members be courageous enough to be different
3. Selecting members committed to achievement
4. Selecting members with the willingness to be accountable for whatever is decided

This is how to catalyze front-line engagement—by staying involved in decision-making, not by skirting it.

Ron McFarland has been working in Japan for 40 years, and he's spent more than 30 of them in international sales, sales management training, and expanding sales worldwide. He's worked in or been to more than 80 countries. Over the past 14 years, Ron has established distributors in the United States and throughout Europe for a Tokyo-headquartered, Japanese hardware cutting tool manufacturer.

The Tao of project management

Allison Matlack

The Tao Te Ching[38], believed to have been written[39] by the sage Lao Tzu[40] in the 6th century BCE, is among the most widely translated texts in existence. It has inspired everything from religions to funny movies about dating, and authors have used it as a metaphor to explain all kinds of things (even programming).

This text is what immediately comes to my mind when thinking about project management in open organizations.

That might sound strange. But to understand where I'm coming from, you should start by reading *The Open Organization: Igniting Passion and Performance*, Red Hat president and CEO Jim Whitehurst's manifesto on corporate culture and the new leadership paradigm. In this book, Jim (with a little help from other Red Hatters) explains the difference between conventional organizations (a "top-down" approach, with decisions coming down from central command to employees motivated by promotion and pay) and open organizations (a bottom-up approach, with leaders focused on inspiring purpose and passion so employees are empowered to be and do their best).

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38 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html

39 https://en.wikipedia.org/wiki/Tao_Te_Ching

40 http://plato.stanford.edu/entries/laozi/

This concept—that employees in open organizations are motivated by passion, purpose, and engagement—plays directly into where I think project managers should focus.

And to explain, I'll return to the *Tao Te Ching*.

Don't let your job title define you

The tao that can be told
is not the eternal Tao
The name that can be named
is not the eternal Name.

The unnameable is the eternally real.
Naming is the origin
of all particular things.[41]

What exactly is *project management*? And what does a project manager *do*?

As you might expect, part of being a project manager is *managing projects*: gathering requirements, managing stakeholder communication, setting priority, scheduling tasks, helping the team resolve blockers. Many institutions[42] can teach you how to manage projects very well, and these are good skills to have.

However, *literally* managing projects is only part of what project managers in open organizations do. These organizations require something more: *Courage*. If you're good at managing projects (or if you're good at any job, really), then you can start to feel safe in your routine. That's when you know you need to find the courage to take a risk.

41 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#1

42 http://www.pmi.org/certification/project-management-professional-pmp.aspx

Do you have the courage to step outside of your comfort zone? The courage to ask important people challenging questions that might raise eyebrows, but that might also uncover a better way forward? The courage to identify the next thing that needs to be done—then the courage to go and do it? The courage to call out communication gaps and take initiative to fix them? The courage to try things? The courage to fail?

The opening passage of the *Tao Te Ching* (which I cited above) suggests that words, labels, and names are limiting. That includes job titles. In open organizations, project managers don't just perform the rote tasks required to manage projects. They help teams *accomplish the organization's mission*, however defined.

Connect the right people

> We join spokes together in a wheel,
> but it is the center hole
> that makes the wagon move.[43]

One of the most difficult lessons I had to learn as I transitioned into project management was that not having all the answers was perfectly acceptable, even expected. That was new for me. I *like* having all the answers. But as a project manager, my role is more about *connecting* people—so the ones who *do* have the answers can collaborate efficiently.

This does not mean dodging responsibility or ownership. This means being comfortable saying, "I don't know, but I will find out for you," and closing that loop as quickly as possible.

Picture a wagon wheel. Without the stability and direction provided by the center hole, the spokes would fall and the wheel

43 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#11

collapse in on itself. Project managers in an open organization can help a team maintain forward momentum by bringing the right people together and cultivating the right discussions.

Trust your team

> When the Master governs, the people
> are hardly aware that he exists.
> Next best is a leader who is loved.
> Next, one who is feared.
> The worst is one who is despised.
>
> If you don't trust the people,
> you make them untrustworthy.
>
> The Master doesn't talk, he acts.
> When his work is done,
> the people say, "Amazing:
> we did it, all by ourselves!"[44]

Rebecca Fernandez[45] once told me that what differentiates leaders in open organizations is not the trust people have *in them*, but the trust *they have* in other people.

Open organizations do a great job hiring smart people who are passionate about what their companies are doing. In order for them to do their best work, we have to give them what they need and then get out of their way.

Here, I think the above passage from the *Tao Te Ching* speaks for itself.

44 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#17

45 https://opensource.com/users/rebecca

Be effortless

> The Master does nothing
> yet he leaves nothing undone.
> The ordinary man is always doing things,
> yet many more are left to be done.[46]

Do you know the type of person who is always extremely busy? The one who seems frazzled and stressed with too many things to do?

Don't be that person.

I know that's easier said than done. The thing that most helps me keep from being that person is remembering that we are all extremely busy. I don't have a single co-worker who is bored.

But someone needs to be the calm in the middle of the storm. Someone needs to be the person who reassures the team that everything is going to be okay, that we'll find a way to get things done within the parameters dictated by reality and the number of business hours in a day (because that's the truth, and we have to).

Be *that* person.

What this passage of the *Tao Te Ching* says to me is that the person who's always talking about what she or he is doing has *no time to actually do those things*. If you can make your job seem effortless to those around you, then you're doing your job right.

46 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#38

Be a culture coach

When a superior man hears of the Tao,
he immediately begins to embody it.
When an average man hears of the Tao,
he half believes it, half doubts it.
When a foolish man hears of the Tao,
he laughs out loud.
If he didn't laugh,
it wouldn't be the Tao.[47]

Last fall, I enrolled an MBA business ethics class with a bunch of federal employees. When I started describing my company's culture, values, and ethics framework, I got the direct impression that both my classmates and my professor thought I was a naive young lady with a lot of lovely daydreams[48] about how companies should run. They told me things couldn't possibly be as they seemed. They said I should investigate further.

So I did.

And here's what I found: Things are *exactly* as they seem.

In open organizations, culture *matters*. Maintaining that culture as an organization grows makes it possible to wake up and look forward to going to work in the morning. I (and other members of open organizations) don't want to "work to live," as my classmates described it. I need to feel a passion and purpose, to understand how the work I do on a daily basis directly contributes to something I believe in.

47 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#41

48 https://opensource.com/open-organization/15/9/reflections-open-organization-starry-eyed-dreamer

As a project manager, you might think that your job has nothing to do with cultivating your company's culture on your team. However, it's your job to embody it.

Kaizen

In pursuit of knowledge,
every day something is added.
In the practice of the Tao,
every day something is dropped.
Less and less do you need to force things,
until finally you arrive at non-action. When nothing
is done,
nothing is left undone.[49]

The general field of project management is too focused on the latest and greatest tools. But the answer to the question of which tool you should use is always the same: "the simplest."

For example, I keep my running to-do list in a text file on my desktop because it serves its purpose without unnecessary distractions. Whatever tools, processes, and procedures you introduce to a team should increase efficiency and remove obstacles, not introduce additional complexity. So instead of focusing on the tools, focus on the *problem(s)* you're using those tools to solve.

My favorite part of being a project manager in an Agile world is having the freedom to throw out what doesn't work. This is related to the concept of kaizen[50], or "continuous improvement." Don't be afraid to try and fail. Failing is the label

49 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#48

50 https://www.kaizen.com/about-us/definition-of-kaizen.html

we've put on the process of learning what works and what doesn't. But it's the only way to improve.

The best processes arise organically. As a project manager, you can help your team by supporting them and not trying to force them into anything.

Practice

> Some say that my teaching is nonsense.
> Others call it lofty but impractical.
> But to those who have looked inside themselves,
> this nonsense makes perfect sense.
> And to those who put it into practice,
> this loftiness has roots that go deep.[51]

I believe in what open organizations are doing. What open organizations are doing for the field of management is almost as important as the actual products and services they offer. We have an opportunity to lead by example, to inspire passion and purpose in others, to create working environments that inspire and empower.

I encourage you to find ways to incorporate some of these ideas into your own projects and teams to see what happens. Learn about your organization's mission and how your projects contribute to it. Have courage, expect to try some things that won't work, and don't forget to share the lessons you learn with our community so we can continue to improve.

Allison Matlack is a project manager leading case management teams at Red Hat. Previously, she was the content editor/manager for the Red Hat Customer Portal for more than three years.

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51 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#67

Leading through the power of "thank you"

Curtis A. Carver

A simple "thank you" can go a long way. Most of all, an expression of gratitude and the recognition of a job well done can reinforce an organizational culture of collaboration and transparency in an organization.

That kind of culture doesn't just emerge automatically. It requires conscious and deliberate behaviors aimed at making sure people know how much they're valued. On IT teams where I've served in a leadership role, I've developed a simple system for making sure accolades get amplified, resulting in organizational communities built on respect and thankfulness.

In this chapter, I'll explain what it involves because I believe any team or organization could implement it overnight.

Praise and progress—in public

We call it Praise and Progress.

At its heart is the Praise and Progress meeting, which we hold once every month. In that meeting, each team in my organization receives two minutes of everyone's attention. They can use that time use to explain something important they recently accomplished; that's the "Progress" part. Then they can publicly thank someone who made a difference to their work. That's the "Praise" part—and it's the most important.

During this portion of the meeting, employees often take time to personally thank—in front of their peers—individuals who helped them and made an impact on their work. Sometimes, participants will thank people who aren't at the meeting: People on other teams or in other departments. When that happens, I send those folks emails to let them know our team has recognized them, and I add my own personal thanks to the note. I also send a copy to their managers.

Occasionally, people will simply thank co-workers who are making a difference in their professional lives. And that kind of gratitude can be extraordinarily powerful. For example, when I initiated Praise and Progress at the University of Alabama in Birmingham, someone came forward to express gratitude for the mentorship he continues to receive from someone who isn't even in his department—a former, exemplary boss who continues to take an interest in his life and wants to help him navigate his career. And as I always do, I contacted that manager to let him know his former employee had thanked him publicly at our meeting and continued to speak so warmly about him. The response I received taught me so much about a new member of my own team.

Overall, the benefits of this monthly community tradition have been amazing. For example:

- Praise and Progress builds a culture of innovation. Every month, we're talking together about our successes and new projects, and that fosters both a sense of forward movement and a spirit of accomplishment.
- The meetings build a culture of gratitude and teamwork within the company. As everyone becomes more comfortable with the Praise and Progress ritual, they open up more—and that culture of gratitude gets even more deeply entrenched.

- As a leader in the organization, Praise and Progress meetings are extraordinarily educational for me because I not only hear teammates' perceptions of the projects they're working on, but I also often learn things I never even knew my organization was doing!
- Discussing our work publicly is a great way to foster transparency across the organization. Since we're sharing our successes and the stories of the challenges that led to them, we can often help one another and lend immediate guidance.

But even more surprising to me was the effect that Praise and Progress had on my organization's relationships with external teams and stakeholders. These simple gestures engage an entire community around an IT project, which helps build communities of practice throughout and across organizations. And that leads to true cultural change. But apart from helping everyone feel appreciated for their hard work, Praise and Progress also helps build "mini-champions" for the IT organization among all the campuses and departments we serve. The tradition leads to situations in which people are talking about all the good things they hear the IT organization is doing. It builds tremendous goodwill, allowing me to kill poisoned seeds before they ever sprout.

Not about you

When you're trying to change an organization, make sure *the organization itself* remains your priority. Any change you initiate should be about the organization; it's not about you. It's about the customers you're serving (students, in my case) and what you're equipping them to do (again, in my case, changing how they think about the world).

Doing that can be difficult. But for open leaders, the best way to do it is to get *a community of dedicated professionals involved* and, one-by-one, convince them that they can be an agent of innovation. Engage them in building the relationships and provide the scaffolding so that they can openly collaborate on building the next generation of leaders, and you will.

Constructing a culture of gratitude is a great first step in doing that. It's amazing what a simple "thank-you" can help you do.

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More engaging meetings begin with trustful relationships

MaryJo Burchard

People tend to focus on the technical elements of meeting prep: setting the objective(s), making the agenda, choosing a place and duration, selecting stakeholders, articulating a timeline, and so on. But if you want people to come to a meeting ready to fully engage, building trust is mission-critical, too. If you need people to engage in your meetings, then you're likely expecting people to come ready to share their creativity, problem-solving, and innovation ideas.

All these things require taking risks—and risks force people to be vulnerable. Trust is therefore fundamental to getting anyone to engage meaningfully in meetings. But trust is not unilateral. If you think people either "trust you or they don't," you're missing important opportunities to help people feel free to bring everything they have to engage in your meetings.

Let's look at seven questions open leaders can ask themselves as they get ready to gauge and build trust levels in advance of their meetings. The extent to which you're able to do this can make or break constructive engagement in meetings.

1. Are you for real?

Engagement begins with people's need for confidence. First and foremost, they're going to want to know that the meeting they are walking into will be exactly what you told them they'd be walking into. They want to be able to rely on and accept the accuracy of your stated reason for the meeting, its objectives, etc., at face value, knowing that you are not intentionally attempting to deceive or trap anyone, nor are you withholding crucial information from them.

When people can trust your authenticity and they know you've shared exactly what they're getting into, they can prepare themselves accordingly. Blindsided people may be reticent to participate at the same depth.

2. Are you safe?

Few things are more daunting than the fear of walking into an ambush. When people wonder if their input will cause someone to be thrown under the bus—or worse, when people fear that problem-solving or brainstorming sessions will turn into a dogpile or blame-fest—you can bet that the only people who will be excited to engage are the people who enjoy being abusive, calling it "collaboration." Contrary to what some in the open source community seem to believe, intentional use of caustic, demeaning expressions for "feedback" will not produce the highest quality outputs.

What the team will end up with *instead* is an unwritten rule that the most oppressive voices always win; other brilliant ideas will be stifled when the people who have them do not feel personally safe to share them. With the exception of people who enjoy the cathartic rush of harsh exchanges, openness to genuine feedback occurs when people do not fear that they will be personally attacked or publicly humiliated in the process. For the strongest possible engagement in meetings, set clear group expectations that balance candor and transparency with enforced communication and behavioral norms that promote confidence rather than intimidation.

When people can trust you to model and reinforce threat-reducing behaviors during collaboration and idea sharing, you make room for a true meritocracy of ideas to emerge.

3. Are you consistent?

One of the greatest gifts a leader or decision-maker can give to stakeholders is a clear sense of consistency. Consistency enables people to obtain some level of clarity regarding the range of possibilities for any given meeting—and it helps them plan accordingly.

Even if people are not fond of your predictable behavior, they can learn to navigate their own responsibilities around what they know you will say or do. As an added bonus, in your absence your consistent behavior will still enable them to engage in making decisions about which they can confidently predict your general thoughts and responses.

When people can trust your words and actions to have clear, reliable patterns, they can gain a clearer sense of their role in the engagement process.

4. Can they depend on you?

Somewhat related to consistency is your reputation for being a person of your word. I have facilitated countless decision-making meetings in organizations that began with the question, "Is this going to be another one of those meetings where we do all the hard work and come up with a workable solution, and then the powers that be are going to just do whatever they want anyway?" Past failures to follow through can destroy people's motivation to attempt to engage again. If a history of undependable follow-through and unkept commitments exists (whether or not you were at the heart of them), acknowledge the failure to the people in advance and discuss with them the measures you will take to keep the current commitments related to this new meeting.

When people can trust your word to follow through on commitments related to their investment in the meeting, they can often give the process another chance, even if others failed to follow through in the past.

5. Do you know your stuff?

Having the skill and expertise to conduct the meeting and discuss responsibilities isn't enough. You need to know your people. A meeting in which the leader is unfamiliar with the group's history, trigger words, social cues, behavioral norms, and shared values will make it very difficult to make sure you (and others!) are engaging in alignment with cultural expectations. Perceived incompetence by the person leading a meeting can be an immediate engagement-killer.

If you are new to the group, before the meeting (or as an opening session), let the people help you catch up with discovery discussions (individually or in small groups), and ask them for help in understanding the shared story, values, history, norms, etc. in addition to any nuanced skills or knowledge you'll need to grasp to facilitate effective discussions.

When people can trust that you know what you are doing, they can relax and focus on their own responsibilities in the meeting.

6. Does the buck stop with you?

With complex or wide-scale projects, it's easy for things to fall through the cracks. People you work with are likely heavy hitters who already want to do a good job—but someone has to assume ultimate responsibility for the success of the entire team. I'm not talking about ultimate "fault" or "blame" in case something goes wrong (we want solutions, not human targets). I'm talking about *ownership*. Someone needs to assume personal responsibility to help set up the task/project/team for success, and own any initiative that needs to be assumed if it begins to flounder. If you assume ownership, you embrace the responsibility to engage with the stakeholders holistically and proactively. Your words and actions will hold you and everyone else to the highest possible standards.

When people can trust that you assume personal responsibility and ownership of helping them succeed, the mental and emotional energy they'd commit to self-protection "just in case you drop the ball" can be redirected to bolstering their own contributions.

7. Do people believe that your intent is to help?

This is the linchpin of trust.

People can handle a lot of things—inconsistent or erratic behaviors, stupid verbal responses, lack of follow-through, even lack of knowledge or ownership—if they can sense that you are really trying to do right by them. It is worth the time to connect with people beyond what you need from them, to take a genuine interest in who they are as people and what's going on in their lives. Beyond being good interpersonal protocol, it's good business.

When people are inclined to believe what you say and do is intended to help and not harm them, they will be more likely to interpret and respond to your failings to have the best possible motives, which often means they'll engage with you to help work through the kinks even if they are frustrated or even angry with your behavior.

Bottom line

Trust is where engagement begins, in meetings and in life. Understanding the multiple dimensions of trust gives us the opportunity to have conversations that can help us build it up wherever it is lacking—before we need it in the meeting.

For example, when we allow someone to tell us, "I trust that you mean well, but I do not yet trust your competence in this skill," or "I trust your expertise and I know you intend to do what you say, but I find that your optimism about what can be done in an hour exceeds reality, so despite your good heart, I cannot currently trust your dependability," we have a chance to pinpoint what areas we need to foster their trust. Responding to statements like these with questions like, "What do you need from me in order to grow in your trust of me in this area?" and then following up to track your progress can also add to others' perception of your intent to do them good.

Stay with it! Over time, both trust—and with it, engagement—will grow.

MaryJo Burchard (Concord Solutions) helps leaders in nonprofits, education, business, and public sector develop open behaviors and interactions to measurably raise the bar of humane engagement in the workplace. She has a PhD in Organizational Leadership from Regent University and conducts training and internal organizational development consulting for the City of Virginia Beach, where she lives with her husband Kenny, their son Victor, and their chihuahua-pug, Stanley.

Chapter title

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Appendix A
The Open Organization Definition

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