The Open Organization Leaders Manual:
Instructions for Building the Workplace of the Future

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

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

The Open Organization: Catalyst-In-Chief (from Opensource.com)

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Join the Conversation

Preface

Bryan Behrenshausen, Red Hat

As the nature of organization changes, so does the nature of leadership.

As post-industrial conditions expose the limits of command-and-control structures, organizing by way of fiat or decree becomes ineffective. As communication technologies become simultaneously more ubiquitous and more accessible, maintaining control through obfuscation becomes untenable. As traditional organization boundaries bleed and blur, comfortable certainties about precisely who is leading and who is led melt away.

And yet the need for effective leaders has not abated. But what does leadership look like in the age of the networked organization?

"The skills required to lead a company that relies heavily on the principles of open innovation are vastly different from those needed to run a business based on the hierarchical structure of conventional organization," writes Jim Whitehurst in his 2015 book, *The Open Organization*. "Changing the way you might be used to leading will be painful, but it will also be critical for every twenty-first century leader to understand and embrace."

This is a book about both the pains and the promises of new leadership models. Part I, "New Attitudes," explores ways that leaders have begun adapting their thinking—the ways they've let open principles seep into their definitions of leadership and guide their missions. Part II, "New Habits," showcases behaviors open leaders have adopted in pursuit of those missions.

As leaders everywhere search for methods that leverage the power of transparency, meritocracy, inclusivity, sharing, and collaboration when coordinating a next-generation workforce, they're experimenting with new ideas and new practices. It all looks more like invention than discovery. But this book contains narratives detailing the results of those experiments. Think of them as potential instructions for building the workplace of the future.

Introduction

Dr. Philip A. Foster, Maximum Change Consulting

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 20^{th} 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 21^{st} 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!

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Part I: New Attitudes

What it means to be an open leader

Jim Whitehurst, Red Hat

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[5]," 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

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

both to each other and to some larger, shared picture. It's helping 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*.*

A leader's ability is the bottleneck of any organization

Nick Dancer, Dancer Concrete Design

A leader's ability is the bottleneck of any organization. That's something I learned through years of work for many different types of leaders. So when I founded my own company—Dancer Concrete Design[6], which specializes in enhancing interior environments through polished concrete floors and epoxy floor coatings—I knew I didn't want to become a bottleneck for innovation and communication.

All those previous bosses had something in common: They saw themselves as the "top" of an organization, and every idea or decision had to pass through them. In other words, they were bottlenecks. To avoid becoming a bottleneck myself, I had to embrace open principles.

I picked up *The Open Organization* after Verne Harish[7] recommended it in his weekly newsletter. When I started reading, I realized this was going to be one of those books I'd be underlining all over, one I will have to review often to fully understand and implement.

But I knew this much: It presented a clear path forward for my fledgling construction company.

6 http://nickdancerconcrete.com/

7 https://en.wikipedia.org/wiki/Verne_Harnish

Scaling up

Because Dancer Concrete began as a company with one employee (me), all decision making naturally went through one employee (again, me!). At first, this was enjoyable. But as we grew to nearly 10 team members (we now have about 16, and we continue to grow), I started feeling like I didn't always have the best information or skill set to be accountable for so many things. The fact of the matter was that I knew my own capabilities well enough to know that I'd stunt my own company's success if I continued to want to be accountable for all parts of our business. And this would also stop others from growing in our organization—where I would be the leader and everyone else would just "do as I say." This type of environment does not allow others' potential to blossom, and it can can start to create the type of workplace where others don't want to go to work: a dead-end with no opportunities for growth in sight.

I started Dancer Concrete intending to make it a place people actually wanted to be every day, a place where they could enjoy what they did. Yes, our work can be physically demanding and sometimes our job sites can be abrasive, so the goal has always been to do the best we can while our team is together and to always be improving.

We started out trying to make our business more fun by little things like free snacks and drinks and going bowling together, but "benefits" like these are quickly lost if the work itself is not rewarding. People are smart and have unlimited potential, so it was important to also create an environment where they were important and contributing to something much more than themselves. We were looking to go deeper and have more impact in people's lives.

Concrete suggestions

Here's one thing I took away from *The Open Organization*: I needed a way to make certain people in our organization fully accountable for certain aspects of our company. This helped in two distinct ways:

1. We had people leading things in their individual areas of expertise, and they were much better in that specific role than I could ever be. This helps us grow and be a better-run company.
2. We had clear systems of accountability and knowledge of who was executing on their responsibilities on a consistent basis.

Let me explain one example of how our accountability system works. Every team that goes into the field to complete work is lead by a Field Team Leader. Really, being a Field Team Leader is one of the most important roles in the company. These people lead the teams that perform the work of installing the products we make. Every Field Team Leader is accountable for maintaining communication with our client during the installation process and making sure the client's needs are being taken care of (and their expectations are being met).

We accomplish this through daily communication, and we finalize a job by having the client sign off on the work and complete a survey about how we performed. We then share this survey data with the entire team, every week, and track these results as part of our key performance indicators. By sharing with the entire team, we make sure Field Team Leaders are accountable for the company's work in the field. It's not just their reputations on the line, but the image of the entire organization.

The Open Organization also stresses the importance of having open dialogue between team members. We do this with two meetings: a weekly team meeting and a monthly business growth meeting.

The weekly team meeting gathers all team members every Monday, first thing, at 7 a.m. (because we're in the construction business, our days typically start a bit earlier than most). In this meeting, we discuss last week's victories and challenges. We try to foster an environment where people can say "Hey, I messed up last week by doing this" without negative remarks or repercussions. We think there is tremendous learning from this kind of sharing.

Then, once each month on a Saturday, the team comes together for a business growth meeting, where we share our key performance indicators for the previous month. These numbers represent total sales, total proposals, quality score, and customer feedback. During this time, we discuss our wins and opportunities with the entire team, and we share ideas for improving or changing the items we should even be tracking. With the exception of employee compensation, our team has nearly complete access to all business-related data.

These meetings taught me something about misgivings people tend to hold about open organizations: These misgivings are based on fear—fear that competitors will find out information about one's company, fear that people share the "bad stuff" about that company, fear that someone will leave that company and become a competitor. Sure, these are all legitimate fears, but even if these things do happen, they don't outweigh the advantages being a more open organization.

Our journey toward being a more open organization continues. We're still finding new and innovative ways to apply lessons from *The Open Organization*.

And that means I'm never a bottleneck.

Nick Dancer is the owner/operator of Dancer Concrete Design in Fort Wayne, Indiana, a company that specializing in enhancing interior spaces with stained and polished concrete floors and epoxy floor coatings.

The Tao of project management

Allison Matlack, Red Hat

The Tao Te Ching[8], believed to have been written[9] by the sage Lao Tzu[10] 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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8 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html

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

10 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.[11]

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[12] 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

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

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

to feel safe in your routine. That's when you know you need to find the courage to take a risk.

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.[13]

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.

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

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 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!"[14]

Rebecca Fernandez[15] 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 or-

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

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

der 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.

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.[16]

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

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

seem effortless to those around you, then you're doing your job right.

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.[17]

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[18] 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 pur-

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

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

pose, to understand how the work I do on a daily basis directly contributes to something I believe in.

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.[19]

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[20], or "continuous im-

19 http://acc6.its.brooklyn.cuny.edu/%7Ephalsall/texts/taote-v3.html#48
20 https://www.kaizen.com/about-us/definition-of-kaizen.html

provement." Don't be afraid to try and fail. Failing is the label 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.[21]

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.

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

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.

How to recognize an open leader when you see one

Huiren Woo, IT student

Not too long ago, my friends and I were talking about open leadership. We began discussing what "type" of leader we all are, and we specifically noted how some people use power and status as a tool for leadership, while others have a certain charismatic personality that makes them a leader.

I interjected with a question: "Then what kind of leader am I?"

And both friends replied: "You're not a leader."

I was shocked. I've always taken a collaborative and inclusive approach to solving problems and completing tasks. And yet, in the eyes of others, I didn't seem to have any leadership qualities.

This gave me an idea: to help others recognize open leadership qualities when they see them in action. The truth is that many open leadership practices just don't resemble traditional leadership practices, so people don't often recognize them *as* leadership practices at all. But that doesn't mean they aren't effective.

In my mind, open leaders really understand how to be *appreciative, open, and helpful*. These common, everyday practices might not seem like anything special, but they truly are—and I'm often surprised how many leaders don't recognize them.

So here's my advice to anyone wondering how to become a more open leader.

Be appreciative

First, always say "thank you" to others and make them feel comfortable. When I first met with Dirk Peter Van Leeuwen[22] of Red Hat, he made me feel that I was on the same level as he was (despite his status both in his organization and in the open source community). When I introduced myself as one of contributors of Fedora Project, without hesitation, he smiled and said to me, "Ah, you're from the Fedora Project! Thank you for your contribution!" It was sincere and genuine, and it made me feel like someone truly appreciated my community contributions. It also motivated me to *keep* contributing. Words are very powerful, and saying "thanks" is one of the ways open leaders can motivate others.

Too often, more traditional leaders take employees for granted—perhaps even think employees should feel privileged while working for them. These leaders never treated their employees well—not a single heartfelt "thanks" for employees' hard work. I've encountered people so blinded by their egos that their good employees have left their teams, leaving them with those who work almost solely for money.

Your employees and teammates are the core of your entire organization's "infrastructure." Without a strong, passionate infrastructure, your organization will collapse. Recognize their efforts at being part of the team and demonstrating the values you wish to aspire. Saying "thank you" not only demonstrates

22 https://www.redhat.com/en/about/company/management/dirk-peter-van-leeuwen

that you value those efforts, but also indicates that you realize you couldn't succeed without them.

Be open

Don't wall others off, and don't be afraid to share your knowledge. All of us are born with a pair of ears—but only one mouth. So try to listen and understand more than you talk. Empathy is difficult; talk is cheap.

Whenever I talk to open leaders like Darwin Gosal[23] or Chern Jie[24], I can easily tell that they're always trying to contextualize and understand what I'm trying to say. Even if they do not share the same sentiments I do, they still take their time to understand my perspective. And whenever I ask a question, they aren't afraid to share their knowledge with me.

Traditional leaders might not be as willing to share knowledge. And even if they do, they always seem to retain some sort of "secret knowledge" that they never share. This is because they believe that knowledge is king, the key to their power as leaders. This makes them appear incredibly stubborn, not accepting of others' opinions—and some even mock others for those differences in opinion. Being open and willing to share is a better way to inspire others to help you reach a goal.

Be helpful

When problems arise, don't just point fingers. Pitch in, take initiative, and fix them. When your teammate or friend needs help, assist them with knowledge and advice, but also by helping them do the work that's causing them difficulty. Doing this doesn't cost you anything.

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23 https://www.facebook.com/darwin.gosal

24 https://www.facebook.com/chernjie

When I needed help with Linux commands, I knew who to ask for help: Loong Jin[25], an approachable ex-Red Hat contractor who have had years of experience with Linux distributions. He's extremely friendly, and always gives great advice on ways to learn certain things. Even though I have newbie questions, he answered them and never put me down. He even encourages and motivates others—especially those who are new.

I've met managers and bosses that only know how to talk. In the end, as the saying goes: Empty vessels make the most noise. These people don't really think to *do* anything, and don't bother finding out *how*. Being an open leader means that you need to deeply understand the work your teams are doing, even to the point where you might be able to do it yourself. That's the best route to achieving empathy.

Conclusion

After reflecting on that conversation with my friends, I've realized that anyone can be an open leader. Just remember that these leaders don't necessarily stand out in a crowd. More often than not, they are *part* of the communities they serve—empowering and inspiring others with their actions. Being an open leader doesn't necessarily require any form of power or status. Nor do you need to be especially charismatic, as generations of built-up knowledge about leadership would seem to suggest.

Because of that, undoubtedly, some people might not recognize open leadership when they see it. Being *appreciative, open, and helpful* are simple human characteristics that build trust—the foundation of *any* relationship. When you've established that trust, people will have confidence in your actions and you'll gain their support—just as I now trust Darwin, Chern Jie

25 https://www.facebook.com/hyperair

and Loong Jin, and have confidence that their actions will benefit our communities and society.

Not all of us come from glorious or rich backgrounds. But no matter our backgrounds, we can learn to always be kind and change our attitudes. It might take time, but, eventually, you too can become an open leader.

Huiren Woo is an ambassador in both the Fedora and Open Organization communities. He's currently studying information technology at a polytechnic in Singapore.

Good leaders know what economics can't explain about open source

Bryan Behrenshausen, Red Hat

Last week, I lucked into 30 minutes on the phone with one of my favorite people: author, speaker, blogger, and activist Cory Doctorow[26]. Our conversation ran the gamut—from open source's role in building a better future[27], to the function of science fiction literature today, to Cory's preference for prose over code. At one point, Cory offered a rather succinct and evocative explanation of what motivates people to contribute to open source projects. And what he said got me thinking about open organizations.

Making open source software, Cory explained, is an artistic endeavor. Any analysis of why people do it should begin with that assumption.

"People don't make art for market reasons if they're being rational actors," Cory told me, "because the expected return of their artistic endeavors is somewhere between 'zero' and 'nothing', in the same way that they expect a return on the Powerball. It doesn't mean that people don't win the Powerball; it just means that if you're being a rational economic actor, then you

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26 http://craphound.com/

27 https://opensource.com/life/16/1/cory-doctorow-predict-future-influence-it

don't invest your money in Powerball. I feel like the same is true of the arts."

People contribute to open source projects for any number of reasons, Cory said, but two of those consistently stand out to him. The first he called (using a phrase generations of open source programmers, following Eric Raymond, have preferred) "scratching an itch."

"There's just something you want done, or it would tickle you if it were done, and so you make it," Cory said. "There are a lot of labors of love, and I think that most of art is, at core, this kind of labor of love."

Cory called the second reason people make open source software the "Stallmanian" one.

"Ethical hacking," he clarified. "There's an intervention you want the work to make in the world, that will make the world a better place for some important reason. That's another reason people make art."

Cory Doctorow certainly isn't the first to puzzle over peoples' motivations for contributing to open source projects. For some time, in fact, bright minds have been trying to determine just *what* drives people to work the open source way.

And they agree with Doctorow on at least one point: framing the problem simply in economic terms won't furnish an adequate answer.

In fact, from a purely (albeit traditional) economic perspective, "open source" shouldn't even work. Political scientist Steven Weber explored this conundrum in his 2004 book, *The Success of Open Source*[28]. It's perhaps the most sustained and rigorous investigation of open source's political economy that I've ever read.

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28 http://www.hup.harvard.edu/catalog.php?isbn=9780674018587

"The microfoundations of the open source process depend on behavior that is at first glance surprising, even startling," Weber writes. "Public goods theory predicts that nonrival and nonexcludable goods ought to encourage free riding. Particularly if the good is subject to collective provision, and many people must contribute together to get something of value, the system should unravel backward toward underprovision."

In other words, because open source code is available to anyone (that is, it's "non-excludable"), and because it's easily replicable at low (or no) cost (i.e., it's "non-rival"), received economic theory would seem to suggest that no one should feel motivated to maintain, improve, or add value to it.

"Why, then, do highly talented programmers choose voluntarily to allocate some or a substantial portion of their time and mind space to a joint project for which they will not be compensated?" Weber asks.

Why, indeed. What, then, is the incentive?

Like Cory Doctorow, we might ask the same question of *any* creative practice—especially those people undertake together. Jim Whitehurst does. In *The Open Organization*, Jim explains the need to consider employees' motivations *beyond* the matter of the paycheck. Today, he says, employees demand a concrete sense of purpose at work, something that transcends economic compensation. Maybe they want to scratch an itch. Maybe they want to populate the world with something they think would bring others great joy. Maybe they want to intervene.

Whatever the reason, economic rationality won't illuminate it. But open leaders need to discover it. And they can turn to open source communities for insight. Yet again, they likely have something important to teach us about the reasons we organize today.

Bryan Behrenshausen is a writer based in Chapel Hill, NC. He's been a member of the Opensource.com team since 2011, and in 2015 he earned his PhD in Communication from UNC, Chapel Hill. Around the Net, he goes by the nickname "semioticrobotic."

Someone left your organization? Time to celebrate

David Burkus, Oral Roberts University

As individual job tenure in companies becomes shorter, leaders say goodbye to even their best people more frequently. How they do this—whether they celebrate or shun the departed—affects not just those leaving but those who stay, as well as the performance of both the old and new firms.

Companies that maintain alumni networks are in a better position to leverage a principle that sociologists call "embeddedness." Every industry is a network of connections: companies, clients, vendors, competitors, and partners. Embeddedness refers to a company's location in the larger network. And location matters: research shows that the strength of a company's relationships to other entities in the industry directly affects that company's financial strength.

This effect was first uncovered by Brian Uzzi in research he conducted early in his career. In fact, it was his doctoral dissertation. Uzzi decided to study the garment industry in New York City, a complex network that he was already a little familiar with. "When my family came over here [the United States] from Italy, they both went into the needle trade. My grandfather was a tailor; my mother went to sewing school," he recalled. Uzzi knew that the New York City garment industry was a network ripe for study, and he knew that different company leaders interacted differently. What he wanted to find out was whether their actions in the network made a difference for their company.

Uzzi studied twenty-three apparel firms in New York City and conducted interviews with each company's CEO and other key executives. He also observed interactions with company employees and distributors, customers, suppliers, and competitors. In addition, he gathered information on company transactions through the International Ladies' Garment Workers' Union (ILGWU), the trade union to which over 80 percent of New York's better apparel firms belonged. The union kept records on the volume of exchanges between different firms in the industry. Uzzi also modeled the likelihood of failure for each firm in the industry against his research on the companies, based on the number of firms that failed during the calendar year of his research. When he analyzed all of his research and compared a firm's network interactions with its likelihood of failure, Uzzi found something surprising.

As he suspected, different firms interacted in the industry differently, and the differences mattered. "Embedded networks of organizations achieve a certain competitive advantage over market arrangements," Uzzi wrote in his article on the research. Some firms did business with only a few trusted vendors (what Uzzi labeled "close-knit ties"), while others portioned out their business by giving many small assignments to various firms ("arm's-length ties"). He found that having strong close-knit ties did increase a firm's chances of survival—but only to a point before being too close with too few firms began to have a negative impact.

The firms with the most success in the industry maintained a solid mix of close-knit and arm's-length ties and selectively chose which ties to use when. "There's this balance between having arm's-length ties that don't go as deeply into the relationship, but allow you to scan the market more broadly," Uzzi explained. "At the same time, the energy spent that you might put into a close-knit tie could have been split up among or across many arm's-length ties. That allows you to get information from many different points of view and then integrate it to produce the very best benefit."

A firm that is too distant from other firms in the industry can't leverage the benefits of trust or get help to solve the challenges they might face. At the same time, being too close to only a few firms prevents the individual company from getting enough new market information and being adaptive to changes in the industry.

That balance between close-knit and arm's-length ties is exactly what an alumni network brings to its parent organization. Current employees and clients become the close-knit ties with whom the company interacts frequently. At the same time, former employees scattered across industries and sectors provide arm's-length ties that can relay important information and serve as important connections. "If I were running a company," Uzzi outlined, "I would want to maintain strong ties with some firms. But I would also like to have lots of looser ties that could be from my alumni network. Not necessarily people that I would want to approach and attempt to get new business from, but to use as more or less market research. So I could find out what's going on in their company, in their market—just kind of general information. I would want that mix of sources for market information."

Companies that engage or build alumni networks are still in the minority, but their numbers are on the rise. As the nature of work and the nature of management change, the way even former workers are managed is changing along with it. The benefits that companies have reaped from networks, as well as the research on the importance of a proper blend of network connections, definitely support the concept of keeping in touch with former employees. There is real value in celebrating departures and making sure that a farewell simply becomes a "see you later."

David Burkus is the author of Under New Management. *He is host of the* Radio Free Leader *podcast and associate professor of management at Oral Roberts University.*

6 principles for successful digital-era CIOs

Margaret Dawson, Red Hat

At a recent meeting, I had the pleasure of hearing Dr. Curt Carver[29], CIO at the University of Alabama at Birmingham, speak on the priorities (and challenges) for today's CIOs. Themes from his talk were familiar, but important: CIOs must help the business grow, gain competitive advantage, and remain secure. He also emphasized many challenges: IT skill set, modernizing IT while keeping the lights on, and maintaining security and compliance.

But his key message was this: CIOs must be transparent, engaged with their community, and available.

Theresa Payton, Chief Advisor and CEO of Fortalice Solutions[30] and former White House CIO, built on these themes at another recent conference I attended. While her "gig" is security, she focuses heavily on openness and "humanness" of both security technology and culture, telling IT leaders they must listen to their users and employees.

I reflected on all this in light of the many CIO-related conversations I've had over the years—with both very traditional

29 https://www.uab.edu/president/administration/carver

30 http://www.fortalicesolutions.com/about/

and future-thinking leaders—and I've developed six key principles for today's successful "transparent" CIOs.

Six principles for successful digital-era CIOs

1. Get out of the IT trenches: Make sure you're meeting with the line of business (including marketing and sales) and really partnering with the business. As one security expert recent asked a room full of CIOs, "When was the last time you went on a walkabout and asked employees what they need?" What a concept! More importantly, engage with your user community. Meet with the users and customers of the solutions you are delivering. If you're part of a university, then talk to staff, professors, and students.

2. Walk around the IT trenches: Don't become so focused on managing "up" to the CEO that you forget to be visible to your IT teams. Take time to listen and walk around. Recognize the developers and Ops guys taking risks and coming up with new ideas. Empower them to solve tough problems and make decisions when they see something is wrong. (How many times has someone in IT seen the warning signs of a breach, but didn't feel the authority to actually say or do something?) Encourage honesty and openness in your team meetings; create a trusting environment in which people can speak the truth. This may sound obvious, but many IT teams I know are afraid to tell their CIO how bad things really are.

3. Share best practices with peers and the world: The best CIOs don't believe their success is some sort of proprietary IP, something to keep to themselves. If they have figured out better security policies, they share them not just with their teams but with their peers and the world. This is why I love seeing CIOs out speaking at conferences, where they openly share tough lessons and successes with others. For the most part, we are all trying to figure out the same challenges. Someone I know who does this very well is Jonathan Feldman. By day, Jonathan is CIO for the City of Nashville. But Jonathan is also an active speaker, blogger, and social media participant. He is not only a great CIO, but an amazing evangelist for technology and the city of Nashville.

4. Use open source intelligence and tools to drive innovation: As CIOs know all too well, this digital era has brought only more intense cybersecurity threats and crime. According to security consulting firm Fortalice, someone discovers a new malways deviant every 90 seconds, and, on average, it takes organizations 205 days to discover breaches. Open source tools, especially those that provide predictive and real-time intelligence or analytics, can help. Of course, you need to actually pay attention and do something with that information.

5. Innovate and fail fast: This new breed of CIOs is not afraid of failing. They want to see their teams pushing the limits and innovating and trying new things. That automatically will end up with some failures. So the key is failing fast, then figuring out what went wrong and incrementally improving. That's agile, baby! As I heard at a recent Gartner conference, "Cyber crime is innovating and using agile development—so why can't we?" Good question.

6. Share your plans: Dr. Carver has his strategic plan[31] online for the world to see. I love this (even if it is dated 2011-2013, the intentions are right!). His advice to vendors: Don't even *attempt* to talk to me if you haven't read my plan and taken time to figure out how you are relevant or can help. Just think how much time everyone would save if your suppliers and ven-

31 http://www.uab.edu/it/home/images/UAB%20IT%20STRATEGIC%20PLAN%202011-2013_FINAL.pdf

dors knew what your plans and priorities were, and you partnered with them to address your key goals. And, as Dr. Carver noted, if the vendor doesn't take time to read them, then you quickly narrow down your vendor list.

Strong communication skills compliment all these principles. It's hard to be transparent and open if you aren't communicating well. As Forbes contributor Peter High[32] says in his report of the top 20 most social CIOs of 2015[33], it (communication) is not a historical strength of CIOs but is now a key differentiator.

High noted that CIOs "must be supreme networkers, collaborating with their colleagues in IT, their colleagues outside of it, establishing partnerships with vendors that will generate new value for the enterprise, and increasingly engaging customers, who are much more tech savvy today no matter the industry."

By being "out there," CIOs enhance their recruiting abilities. In this highly-competitive IT market, getting talented admins, devs, ops managers, and analysts is challenging (to say the least), as you're competing with the Googles and Amazons of the world. But when your team sees you "out there" promoting the work they are doing, and sees you in the halls and cubes, they will feel more involved and appreciated, have higher job satisfaction, and refer others to your organization.

Much research has shown that millennials care much more about job satisfaction and "feeling good" about where they work than the level of pay they receive, so CIOs (and every executive) can use transparency, and especially social media, to attract the next generation of IT workers.

32 http://www.forbes.com/sites/peterhigh/

33 http://www.forbes.com/sites/peterhigh/2015/04/15/top-20-social-cios/

As we all evaluate what must evolve in this digital era, these principles are good places to start—not only for CIOs, but all leaders wanting to embrace a more open organization.

Margaret Dawson is a 20-year tech industry veteran and a frequent author and speaker on topics like cloud computing, big data, open source, women in tech, and the intersection of business and technology. She is a proven entrepreneur and intrapreneur, having led successful programs and teams at several startups and Fortune 500 companies, including Amazon, Microsoft and HP.

Part II: New Habits

6 steps to running the perfect 30-minute meeting

Jimmy Sjölund, Skanska IT

A few weeks ago, I read Jim Whitehurst's call to ban the one-hour meeting[34] in the *Time* article "25 Daily Habits That Will Make You More Successful[35]". Jim recommended making 30 minutes the default meeting length.

I made this change myself last summer, when I saw my calendar filling up with more meetings than I could possibly attend. I host (and am invited to) many meetings, most of which are booked for one hour (or longer). So I began to observe what I could do to ease my busy schedule.

I immediately noticed that no one planned meetings for less than one full hour. On top of that, these meetings included so many people, and I reflected on whether everyone present really needed to attend (but that's another story). The third insight was this: a meeting most often lasts for the entire time it's booked, no matter what. It's a variant of Parkinson's law[36]: a meeting expands so as to fill the time available/scheduled.

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34 http://time.com/4097259/successful-daily-habits/item/15-ban-the-one-hour-meeting/?xid=emailshare

35 http://time.com/4097259/successful-daily-habits/?xid=tcoshare

36 https://en.wikipedia.org/wiki/Parkinson%27s_law

So I started trying to run my own meetings in 30 minutes or less. But strong cultural norms often govern meetings, and one of those norms is the hour-long default, which people book "just in case." I also noticed another odd tendency: People arriving at meetings on time, then immediately leaving the room to grab coffee. Add about five or 10 minutes of pre-business small talk when they return, and you already have too little time to tackle the meeting's entire agenda.

After several months of pushing for 30-minute meetings, however, I've come to believe they truly can be done. Here are a few suggestions for reclaiming some of your precious time.

Prep your tech

If you are hosting the meeting, ensure the technology you need is working before the meeting starts. That might be hard if you don't get access to the meeting room until the very last minute, or if your previous meeting ends just as another begins. But too many meetings have started with another five or ten minutes of struggling with a projector and audio/video conferencing equipment.

Trim the guest list

Running short meetings is much easier with fewer participants. Meetings of two or three people are much easier to keep focused and on-time than they would be if eight people were in the room. More people might mean more brains and knowledge, but it also means each discussion can take longer if everyone speaks up.

Appoint a referee

We've all been there: the meeting that never ends. Just when you thought the meeting *would* end, someone repeats something that's already been said, and the same discussion starts over again, going in circles. I recommend appointing someone to help the meeting stay on track, someone with the courage to stop another round of banter unless some new, interesting insight will emerge.

People fear ending meetings after just a short time. They think, "What have we missed? Did we really discuss the topic thoroughly enough to be able to make the right decision?" My tip here is to *actually end the meeting*, and if you or other participants later feel a need for additional discussion, then schedule a new, 30-minute, meeting for it.

For some personalities and topics, having several short sessions is actually *better* than one long session. This way, you get to process the discussion on your own—and maybe generate new insights or issues to raise in the next session, or come to terms with the conclusion at which the group arrived, helping you move on.

Keep it simple

A short agenda is, of course, easier to complete than a long one. Always monitor the desire to break free of the agenda; make note of topics that seem to drain the meeting's time or energy, and break them into a new session at another time. To help keep meetings short, I recommend holding *standing* meetings (no chairs allowed!). In my workplace, though, this can be difficult; all meeting rooms have chairs, and people tend to sit (or slump) if they're available.

Skip the presentations

If possible, distribute information *before* the meeting and ask everyone to read and process that material in advance. This makes meetings about *discussion* rather than presentations. I've even seen people record presentations beforehand, then distribute that presentation to the participants before they arrive (instead of simply sending out the slides or other documents). I haven't tried this yet, but from what I've read, it seems like something I will.

Remember why you're there

The meeting's purpose will influence its time limit, too. A weekly status report meeting in front of a Kanban board[37], for example, is easier to run in 15-30 minutes than a monthly meeting including a presentation would be. In fact, many agile methods suggest a daily standup meeting that lasts no longer than 15 minutes (but you might just find it harder to book people in weekly 15-minutes meetings than in single monthly one-hour meetings).

Much of what I've discussed here pertains to commonplace meeting habits, rules, customs, and behavior—but that's exactly what I'm trying to help you expose and change. Running shorter meetings is *hard*. People accustomed to hour-long meetings will probably find 30-minute sessions stressful at first. But as more people notice the benefits of shorter meetings, they'll become easier. Changing a culture is always difficult, and you won't do it over night. But hang in there and start reclaiming the hours in your day—one meeting at a time.

Jimmy Sjölund is a service manager at Skanska IT Nordic Sweden AB. He's an open source enthusiast interested in growing and evolving communities and teams and exploring agile work flows. He's also a Kanban enthusiast.

37 https://en.wikipedia.org/wiki/Kanban_board

How to interview for culture fit

Sam Knuth, Red Hat

"How do you get people to . . . get it?" That question came from Jane, someone I was talking to at a recent networking event. The theme of the event was "new forms of leadership," and, more specifically, what "being a boss" means in today's business climate. Jane was explaining that her organization is an "open" organization, where the hierarchy is secondary to the merit of ideas—no matter where they came from.

But Jane told me she struggled to hire people who not only understand this but are also excited about it (as opposed to people terrified by the prospect of a culture in which everyone has an opinion about your work and is not shy about sharing it). Apparently, Jane's organization had recently hired a few people who, ultimately, hadn't worked out.

The problem, Jane told me, was something that's critical in open organizations: "cultural fit." And the more Jane and I talked, the more I realized how important designing job interviews to specifically address this "fit" has become today.

It's not for everybody

Hearing Jane's conundrum made me think of Bill.

I remember Bill vaguely from my early days at Red Hat. When I'd bumped into him in the hall and introduced myself, I'd learned it was Bill's first week on the job as a partner relationship manager. He'd just left a similar role at a major enterprise hardware company. Bill looked like what I would call a traditional business person; he was wearing a suit and making copies at the Xerox machine (two things I didn't see many people do at Red Hat in those days). He looked slightly uncomfortable, but I didn't think too much of it. A week later, I heard he'd quit—went back to the giant enterprise hardware company.

"Ran for the hills," someone said.

"I think we scared him off," said someone else.

We laughed, acknowledging that Red Hat "wasn't for everybody," or could seem "a little crazy" at times.

But for Bill—and Bill's manager—I'm sure the sudden departure was no joke. Anyone who's hired someone who didn't work out knows what an expensive, emotional, and time-consuming mistake that can be for everyone involved.

I asked Jane (who had just "separated" from an employee who, like Bill, didn't "fit" with her organization) how she explained her company's culture to candidates.

Did she explain what the culture was like, especially the part about the diminished importance of hierarchy? Did she make sure candidates knew about the organization's emphasis on openness and sharing?

She told me she did.

But did she ask her candidates questions designed to determine whether they were comfortable with this idea, or had been exposed to it in the past?

Well, sort of, she said.

Did she give detailed examples of what this looks like in action, by telling real stories from her own experience?

No, she said. She hadn't done that.

Moving culture to the foreground

Jane isn't alone. Sometimes, interviewers don't sufficiently stress the role of culture (and "cultural fit") when they're hiring. To avoid this, I ask a specific question during interviews in order to test a candidate's cultural fit for an open organization:

"How would you describe the culture at your current company?"

As I listen to the response, I'm searching for a few things: Does this person know what I mean by "company culture"? How much do they pay attention to it? How important do they think it is? Do they reveal how they feel about it as they describe it?

To follow up, I ask (directly) what the candidate likes and doesn't like about that culture. I might also ask the person to share a story from the first few months on a job as a way of determining whether the candidate found adapting to the culture of their current company difficult. The way people describe challenges with a culture reveals a lot about their preferences and relative comfort zones.

Red Hat has formalized the process of hiring for cultural fit. Our People team designed a hiring framework called "Right for Red Hat," and it explains everything a hiring team needs in order to evaluate candidates' "fit" for our organization—both in terms of Red Hat business goals and Red Hat cultural attributes. The framework details how to structure an interview team, what kind of questions to ask, and how to evaluate answers. In the spirit of transparency, we present the framework to prospective candidates via our job portal. The interview isn't just about us evaluating the candidate. It's also about them evaluating us: are we right for them?

Getting it (right)

Our questions are straightforward. Some concern specific technical or domain knowledge. Others we've designed to gauge problem solving, strategic thinking, and leadership qualities. We don't ask "brain teasers," riddles, or questions that test a person's general knowledge. We want to hear specific stories that emerge from past experience; we want to learn how candidates approach different situations, how they react to circumstances, and how they learn from successes and failures.

By listening to the way someone tells a story about an experience they've had, we're listening for clues about their preferences and working style. Does it sound like the candidate defaults to making decisions in a transparent, consultative way? Or does it sound like this person prefers a more traditional, top-down, decision-making approach? Does the candidate seem comfortable with opening work to scrutiny from anyone who's interested? Do they tend to share their work sooner than later and seek out feedback? Or do their stories indicate that sharing work in progress might be uncomfortable or threatening?

Thinking back to Jane, a manager looking to hire candidates comfortable in an open environment, and Bill, the short-term Red Hat associate who didn't understand how to work within our culture, I've come to realize that the most important element of any open organization interview is honesty and transparency—on both sides of the hiring process.

If you're a hiring manager, you should offer candidates concrete and specific stories that illustrate what your working environment is really like (and offer as many as you can). If you're a candidate, you should think about what you really prefer, and in what kind of circumstances you feel most comfortable. And both of you should be approaching the entire process with the notion of "cultural fit" firmly in mind—because for some people, the idea of working in an open organization might be more appealing than the reality of doing so.

At Red Hat, Sam Knuth leads the Customer Content Services team, whose goal is to provide customers with the insights they need to be successful with open source technologies in the enterprise.

When empowering employee decision-making, intent is everything

Ron McFarland, General Department Manager

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.

7 characteristics of open leaders

Jackie Yeaney, Red Hat

"I'm glad I'm at the end of my career," a weary-sounding CIO confided in me on a recent trip to India. "I just don't think I can adapt as fast as today's market needs me to."

The fact that a long-time, successful leader would say this to me was—to be perfectly honest—a shock. But I empathized. We all realize that workforce dynamics are changing. Digital disruption is changing the nature of business, contemporary workers are demanding more from their organizations, and what it means to be a leader is shifting significantly[38] as a result. But this candid admission from a CIO standing right in front of me (someone running all of IT in APAC for a global company) made all those trends much more concrete, much more real, and much more urgent.

There's no doubt about it: The nature of "effective" leadership is changing faster than any single person can comprehend. "Top-down," "directive-driven" leadership styles are actually losing their effectiveness in workplaces where hierarchies are no longer the norm, where succeeding now requires more than business acumen. And for marketers especially (particularly

38 https://hbr.org/2016/06/to-go-digital-leaders-have-to-change-some-core-beliefs

those of us in B2B marketing), upheaval is becoming commonplace[39].

This is a world that calls for leaders to become—in a word—open.

Open characteristics, open behaviors

"Open" is becoming a bit of a buzzword[40] today, but, to me, it means something very specific in the context of leadership. I've always liked the way Charlene Li describes open leadership in her book on the subject[41]. To Li, "open leadership" means "having the confidence and humility to give up the need to be in control while inspiring commitment from people to accomplish goals."

It's a powerful definition, one that has become even more powerful to me the longer I ponder its implications. To me, you are an open leader if you embody five key characteristics:

- Authentic
- Accessible
- Trusting
- Risk-taking
- Vulnerable

But these are just *characteristics*. They don't mean much until they manifest themselves in everyday habits and practices—until they influence *the way other people around you behave*. I believe these characteristics of open leaders typically translate into the following demonstrable behaviors:

39 https://opensource.com/open-organization/16/5/marketing-changes-some-things-never-will

40 https://opensource.com/open-organization/16/5/appreciating-full-power-open

41 http://charleneli.com/books/open-leadership/

A sense of purpose. Traditional leaders are task-focused. They typically maintain control by *dividing* people, by drawing clear boundaries around people's responsibilities and job descriptions, then ensuring everyone is doing precisely what he or she has been "assigned." Open leaders are purpose-focused. They lead not by doling out assignments, but by acting as translators of an organization's mission, inspiring their teams by helping them understand how the work they're doing fits into a broader picture of success. When their teams innovate and develop winning solutions they hadn't considered, they advocate for those solutions.

Approachability. While more traditional leaders tend to lead by cultivating fear (fear of disappointing one's boss, fear of ramifications from missing that one "key metric," fear of exposing oneself as inadequate in some way, etc.), open leaders encourage their teams to open up to them about their struggles, their difficulties, and their disagreements. They help people understand that inadequacy and fear of disappointment are common and normal. They work with their teams to create environments where people can be honest and forthcoming with their questions and concerns. It's a move from leadership by *fear* to leadership by *patience*—which is, as I've said before[42], one of the hardest lessons I've had to learn about being an open leader!

Humility. Traditional leaders believe they have to know everything, that they've actually become leaders because they have more knowledge and are smarter than anyone else around them. But that just isn't true—and it's a dangerous way to comprehend the reasons a person can (or should) become a leader! Open leaders are humble. They know enough to know exactly

42 https://opensource.com/open-organization/16/3/my-most-difficult-leadership-lesson

what they don't know, and they rely on their teams to help them see it. They tend to offer *perspectives* and *ideas* (not hard-and-fast *answers*), which they prefer emerge collaboratively, in dialog.

Empowerment. Open leaders put their teams before themselves. Where traditional leaders issue instructions, then listen for feedback about people's successes or failures carrying out those instructions, open leaders *listen first*. They treat their teams as subject matter experts, and they do their best to *enable* their teams based on what they're hearing from them. Their first question is not: "How can I get these people to do what I need them to do?" but rather "How can I help these people do what they're showing me is most important?"

Transparency. Open leaders are transparent. This means they are clear in their intentions and motivations, and disclose as much as they (legally and ethically) can about the conditions that lead to a particular decision. Closely related to transparency, then, is the notion of *authenticity*. Traditional leaders often allow themselves to make unreasonable demands of their teams—"unreasonable" precisely because they don't make the same demands of themselves. Open leaders practice what they ask of others. They don't dictate. They model. What their teams see in them is exactly who they are—and who they want their teams to emulate.

Advocacy. Open leaders are tireless advocates for their teams. While traditional leaders might intensely scrutinize every detail (at every minute!), open leaders give their teams the latitude to make the decisions and form the solutions they're best suited to produce. I've heard others describe this as a "long leash" approach to leadership, but that's not quite right. That "leash" is more like a lifeline or umbilical cord: a connection we maintain with members of our teams not so we can continually control them, but so we can guide them, nourish them, and fight for them.

Trust and respect. This is perhaps the most important pair of behaviors open leaders demonstrate. Where traditional leaders might try to ignore their teams' personhood by asking them not to take things personally, to check their emotions at the door, and to expect the same from one another, open leaders recognize that work is *always* personal—especially if they're already committed to connecting people's deeply individual passions with their organization's overall missions. Open leaders celebrate their teams' humanity. Put even more simply: Open leaders respect people enough to know that it's never "just business."

To win, be open

The war for top talent is real, and it's only intensifying. Succeeding in that war will require more than workplace "perks" like on-site gyms and lots of snacks. It will require a new brand of leadership, one tuned into the needs and desires of today's workforce. Today's workers are looking for leaders that are accessible—people who invest in them, include them in the effort to solve tough problems, and are willing to help them chart their career paths. You won't be able to please (and retain) everybody, but for as long as people have chosen to be part of your team, you want them not only doing their best work but also feeling nurtured, recognized, and appreciated.

And that means much more openness—not just for leaders, but for everyone.

Jackie Yeaney is responsible for orchestrating Red Hat's strategy formulation and planning, Brand, Global Programs, Global Partner Marketing, Marketing Communications, Marketing Operations, and Global Field Marketing.

An open process for discovering your core values

Beth Anderson, The Hill Center

When I joined The Hill Center in Durham, North Carolina, as Executive Director nearly two years ago, I realized immediately that I had joined a wonderful, successful, highly conventional education organization. Hill has been transforming students with learning differences into confident, independent learners for nearly 40 years, and many of the faculty and staff (including the outgoing Executive Director) had been at Hill for most of that time. Hill has a strong culture, and its faculty and staff all consistently deliver high-quality programs for students and teachers alike—all despite evident tensions, misunderstandings, and mistrust between senior administration, faculty, and staff as well as across different programs and teams in this rigidly siloed, hierarchical organization.

From the start, I publicly stated I wanted to address issues of culture, trust, and transparency, in part by establishing organizational core values. But I didn't know how or when to do so. And, candidly, I was scared. I knew I couldn't come into Hill and impose my own core values, yet I was petrified of what might emerge if I opened the value-creation process to everyone —and I didn't how I would respond if I simply didn't believe in, like, or want to adhere to what did.

Hill did have core values posted on its website and included in its strategic plan, but they just didn't resonate with me, and hardly anyone within the organization could articulate them. I saw both an opportunity and a challenge. Despite my public proclamation, however, I decided to wait.

The time comes

Fast forward 18 months.

I'd read *The Open Organization* (and many other articles along the way) as I tried to navigate the path forward, discover my authentic leadership and management style within this (still very foreign) context, and lead change in a non-threatening manner. I'd adopted and promoted "All Hill" language and events to help break down silos. We'd engaged in an All Hill "strategic visioning" process that was faculty/staff-centric, rather than being led by the board, and that resulted in some new relationships, dialogue, and common language. We had hired, retired, or exited many faculty and staff, resulting in an organization that was suddenly fairly evenly split—almost exactly one third newer personnel, one third in the three-to-ten-year range, and one third employees who had been at the school more than a decade (half for more than 20 years). And we were still very, very far from being an "open organization."

So I decided it was time to embark on a core values process, and I decided to do it as collaboratively, openly, and organically as felt possible. I had no idea where it would lead or what would result. And I was still scared.

Why did I decide suddenly it was time? First, we were losing veterans to retirement each year, and I didn't want to lose their perspectives on what made Hill successful and unique—and what had made them dedicate decades of their lives to Hill. Moreover, as we welcomed the next generation of faculty and staff, we needed to be able to recruit and retain great people, and clearly communicate and deliver on "Why Hill?"

By soliciting ideas and feedback from staff, I could honor what we'd done well in the past while preparing for future transformations. Second, I knew teachers at The Hill Center often spoke positively about feeling autonomous and enabled in their classrooms, and I wanted to recreate that feeling of empowerment and involvement at an organizational level. Finally, I recognized that a sense of ownership of shared values could foster parity across staff members with varying levels of experience and authority.

When it comes to adhering to and executing on our core values, nobody is held to a higher or lower standard; consistency of values prevents favoritism or bias in decision making. Anyone should be able to ground a conversation with anyone else—regardless of position, team, or program—in shared core values without making that conversation personal. In short, by asking All Hill to collaborate on "discovering our core values," and then making the final product explicit and alive, I hoped to reinforce the greatest strengths in the pre-existing culture of The Hill Center while continuing the move towards a more open, transparent, and trustful organization.

We just needed to think about how we'd actually do it.

Discovering our core values

Along with Michelle Orvis, Hill's Chief of Staff, I began reading articles and watching videos related to open sourcing core values, and we informally interviewed personnel from other organizations to solicit their advice. In the end, we wanted a hybrid approach: something open and inclusive but not completely democratic or consensus-driven. We also did not want the process to be too time-consuming for our already busy faculty and staff. We wanted to conduct it over several months, but not forever, and we wanted to accept input in a variety of forums.

After announcing the process and sharing multimedia examples from other organizations over email, we had an optional "lunch 'n learn" kick-off (I had learned early on that the only possible window for bringing All Hill together was lunchtime, between morning and afternoon classes!). I provided some context, laid out two guiding principles for our core values—"clear and simple" and "truly authentic"—and folks worked individually, in pairs, and in small groups to describe the "essence" of Hill in words and phrases. We captured the words and phrases, then shared and discussed them via email communications, smaller informal lunches, and preliminary synthesis and discussion at a half-day leadership team retreat. During this process, we also added two more guiding principles: "Bias towards action" and "All Hill—knit together entire organization."

Following one of the informal lunch discussions, I received an email from Kate Behrenshausen, one of The Hill Center's newest teachers. The note surprised me, given that Kate had opted out of the kick-off meeting at the beginning of the process. Suddenly, she was ready not only to participate in the values-writing process, but also to engage further by collaborating on additional writing (like this article for Opensource.com!).

How had Kate made the jump from disinterested to engaged, and what could I learn from this?

Initially, Kate admitted, she did not believe the core values process would apply to her role at Hill; in fact, she admitted, she wasn't even totally sure what "core values" meant. To her, they sounded like sterile, superficial management buzzwords.

But later, when I asked Kate and her coworkers to submit five words or phrases that described the "essence" of Hill, she was intrigued. She'd received a concrete method for providing feedback, and she appreciated the implication that her opinions mattered. In fact, she said, that feeling of appreciation had guided her decision to join Hill in the first place. During an early interview, Head of School Bryan Brander had reassured her that Hill gives its teachers the freedom to do what is best for student learning. Bryan's words inspired her—especially after several years in the public school system, where decisions seemed to come from far-off offices of people who did not know her students and would never see her classroom. In her estimation, the follow-up core values activity had reinforced those feelings of reassurance, encouragement, and inclusivity.

All (Hill) in

I recently shared draft core values with All Hill at one of our bi-monthly, post-board meeting lunches. The draft was an updated version of what our leadership team synthesized from the "words" activity at the kick-off lunch, then modified to reflect the other feedback I had been collecting in formal and informal ways. We've posted them on the wall in the mailroom with markers, post-its, and dots in hopes that folks will share their reactions, ideas, questions, concerns. We'll go from there, working towards unveiling "new" core values at our August Back-to-School kick off.

What currently hangs on the wall are not the core values I'd have written myself (though many of my original themes do come through). Some of them raise questions (even concerns). And yet, on the whole, I feel better about them at this point than I might have expected, and I think they will spur more needed dialogue as we progress. I've learned three valuable lessons so far:

- Letting go can be both scary and liberating. While I certainly haven't let go completely, I haven't "backwards planned" or tried to over-engineer it, and I genuinely have listened and sought out the input of everyone. And it's been fun, engaging, stimulating, and affirming of the many great people, ideas and things happening every day at Hill—much less work for me than it could have otherwise been, too!

- "Authenticity" is a simple but challenging guiding principle, for both individuals and organizations. But to me it seems central to being an "open" leader and organization. What seems authentic to some may not to all; what is authentic in certain relationships or circumstances may not manifest itself in others. And what if there are things about "who we are" as an organization that we need to change in order to thrive and survive, or about who we think we are supposed to be that we need to actually embrace more fully rather than let go? I think we may need to have some hard conversations about authenticity as a part of this process.
- Nothing is better than actually sitting down and engaging in dialogue with different people, taking the time to talk less and listen more, and then having the discipline to capture and translate that dialogue into something that is made explicit and shared. It takes time. It takes planning. It takes effort. But it is so much better than just thinking about things or wishing them to be different or true.

I still have a long way to go and grow as a leader at Hill. And we still have a long way to go and grow as an organization. But the journey is one worth taking. And I am determined to enjoy and learn from the ride. Hopefully, many others feel the same—and will join Kate and me along the way.

Beth Anderson is the executive director of The Hill Center in Durham, North Carolina. The Hill Center is a private-public, K-12 model that serves students who are struggling academically—especially those with learning differences and attention challenges—and their teachers.

An open leadership development system

DeLisa Alexander, Red Hat

At Red Hat, we have a saying: Not everyone is a people manager, but everyone is expected to be a leader. For many people, that requires a profound mindset shift in how to think about leaders. Yet in some ways, it's what we all intuitively know about how organizations really work. As Red Hat CEO Jim Whitehurst has pointed out, in any organization, you have the thermometers—people who reflect the organizational "temperature" and sentiment and direction—and then you have the thermostats—people who set those things for the organization.

Leadership is about who you influence and how you make an impact.

This is the story of how we built a leadership development system at Red Hat to enable our open organization's growth while sustaining the best parts of our unique culture.

Developing open leaders

In an open organization, you can't just buy leadership development training "off the shelf" and expect it to resonate with people—or to reflect and reinforce your unique culture. But you also probably won't have the capacity and resources to build a great leadership development system entirely from scratch.

Early on in our journey at Red Hat, our leadership development efforts focused on understanding our own philosophy and approach for leadership development, then taking a bit of an open source approach: sifting through the what people had created for conventional organizations, then configuring those ideas in a way that made them feasible for an open organization.

Looking back, I can also see we spent a lot of energy looking for ways to plug specific capability gaps.

Many of our people managers were individuals—engineers and other subject matter experts—who stepped into management roles because that's what our organization needed. Yet the reality was, many had little experience leading a team or group. So we had some big gaps in basic management skills.

We also had gaps—not just among managers but also among individual contributors—when it came to navigating tough conversations with respect. In a company where passion runs high and people love to engage in open and heated debate, making your voice heard without shouting others down wasn't always easy.

We couldn't find any end-to-end leadership development systems that would help train people for leading in a culture that favors flatness and meritocracy over hierarchy and seniority. And while we could build some of those things ourselves, we couldn't build everything fast enough to meet our growing organization's needs.

So when we saw a need for improved goal setting, we introduced some of the best offerings available—like Closing the Execution Gap and the concept of SMART goals (i.e. specific, measurable, attainable, relevant, and time-bound). To make these work for Red Hat, we configured them to pull through themes from our own culture that could be used in tandem to make the concepts resonate and become even more powerful.

In a culture that values meritocracy, being able to influence others is critical. Yet the passionate open communication and debate that we love at Red Hat sometimes created hard feelings between individuals or teams. We introduced Crucial Conversations to help everyone navigate those heated and impassioned topics, and also to help them recognize that those kinds of conversations provide the greatest opportunity for influence.

After building that foundation with Crucial Conversations, we introduced Influencer Training to help entire teams and organizations communicate and gain traction for their ideas across boundaries.

We also found a lot of value in Marcus Buckingham's strengths-based approach to leadership development, rather than the conventional models that encouraged people to spend their energy shoring up weaknesses.

Early on, we made a decision to make our leadership offerings available to individual contributors as well as managers, because we saw that these skills were important for everyone in an open organization.

Looking back, I can see that this gave us the added benefit of developing a shared understanding and language for talking about leadership throughout our organization. It helped us build and sustain a culture where leadership is expected at all levels and in any role.

At the same time, training was only part of the solution. We also began developing processes that would help entire departments develop important organizational capabilities, such as talent assessment and succession planning.

Piece by piece, our open leadership system was beginning to take shape.

Stages of open leadership

With our mantra of "Not everyone is a manager, but everyone is expected to be a leader" in mind, we started observing that leadership has different stages, based on influence and impact.

Individual Leadership. Leadership begins with each *individual*. An individual is a leader when they enrich an organization's culture and others see them as an influential voice on a particular topic. Individual leadership can be an incredibly powerful force in an open organization.

Team Leadership. At some point, every individual leader begins to reach the limits of how they can influence as an individual. This brings them into the next stage: *team leadership*. This when their impact becomes additive, when they learn how to tap into, combine, and align the individual strengths of every member of a group to bring about a shared vision.

While this certainly happens with managers and their direct reports, in an open organization, that's not exclusive to people managers. Project and program leaders are examples of individuals who contribute at the team leadership level. So are members of other groups and communities—both formal and informal—who align the strengths and interests of their stakeholders, collaborators, and other people.

Organizational Leadership. The next stage of leadership is what we think of as *organizational leadership*. It's when an individual's impact becomes multiplied, because they compound and integrate the strengths of teams (groups of people) to create new organizational capabilities that drive important outcomes.

It's having the vision for where an entire organization needs to go, the foresight to bring the right teams and leaders together, and the ability to channel their passion and energy toward a shared organizational purpose in order to deliver rapid results together.

This stage of leadership is what's required of middle and senior management in open organizations. It's also what it takes to be an effective leader (e.g. board member, project leader, change agent) in any opt-in community that comprises many smaller projects or teams and spans many boundaries, e.g. an open source community with many sub-projects.

Enterprise Leadership. The final stage of leadership is what we think of as enterprise. It's when an individual leader catalyzes the passion and contributions of all the people in that organization to form a vibrant ecosystem for open leadership and culture. Enterprise leadership is when the impact of your contributions is exponential, because it's magnified by the number of people you influence, and the number of people who they influence, and so on.

Enterprise leadership is being what Jim Whitehurst describes as "a Catalyst-in-Chief" for an organization. It's having the intuition and influence and impeccable timing to know when and how to bring forward important issues—and when to let those go. It's knowing how much direction to provide, how much context to give, and how much faith to have in your organization's ability to find its own way forward.

This stage of leadership is the most elusive to describe and to reach. It's the one that "you know it when you see it." It's what's required of executives, particularly C-level executives, in an open organization. You will also see enterprise leadership in visionary leaders who direct and strongly influence the efforts of large participative communities, such as Wikipedia or Drupal.

Based on these leadership stages, we realized that we needed to meet every Red Hatter where they are, understand and leverage their strengths, and stretch them to build additional leadership capabilities. At times, we would need ways to accelerate their development, so they would be ready to step into bigger roles when our organization needed them to.

The OPT model

One of my favorite homegrown pieces of our open leadership system is the OPT model, which was developed by my colleague Jan Smith, based on her observations within Red Hat and experience working with various leadership models. As you'll see, it's a strengths-based approach to development:

Figure 1: The OPT Model

We use the OPT model in coaching, development, and planning at Red Hat. The idea is that when someone is doing work that they love (their passion), and work that they are good at (talent), and that work fills an organization's needs, they will be performing at their peak. That's a task that will give them energy. It will feel rewarding and fulfilling, and they will feel that the organization deeply values them.

The OPT model is a tool that can be used at many different stages of leadership. At the individual stage, it's a powerful tool for reflecting on how you spend your time and energy, and taking ownership of your career. At the team stage, it helps you think about the different kinds of work that give people energy, and create roles or responsibilities that are mutually beneficial. It's a conversation starter that helps you—whether you're the manager or the associate—to think not just about development within the current role, but also about the possibilities and opportunities for future roles.

It's just one of many ways that leaders in an open organization can make the most of powerful motivators like purpose and passion.

Finding our leadership multiplier

One alarming trend we observed when we began hiring a number of new senior leaders from conventional organizations inspired the creation of a key component of our open leadership development system.

Although we were careful to explain that things worked a bit differently in an open organization, time and again, we saw the same thing happening: Leaders with important skills that we needed—people who had been highly successful in companies where authority comes by rank rather than influence—struggled to lead in our unique culture.

We needed many of the skills that those leaders had. At that stage in our company's growth, we wanted help and insights from people who had experience leading a global enterprise at the senior leadership level.

We had to find a way to bring in people from top-down, command-and-control, conventional organizations and help them understand how to lead in an open organization. We needed a common language for explaining what it takes to be successful in Red Hat's unique culture and work environment.

Perhaps not surprisingly, we took an open source approach to the issue. We started asking questions of associates throughout Red Hat to understand what constitutes a great leader at any level of the company, in any role or department. We wanted to know what differentiates great leaders at Red Hat (or in an open organization) from great leaders at any other company.

We found that, in addition to more typical leadership capabilities, leading in our open organization requires the mastery of some differentiated behaviors that we dubbed the *Red Hat Multiplier*:

- **Connection**: Building a sense of community where associates feel strongly connected to Red Hat
- **Trust**: Demonstrating a general belief in others' ability to make a contribution
- **Transparency**: Openly sharing information that contributes to the work of others
- **Collaboration**: Engaging multiple sources to generate the optimal solution
- **Meritocracy**: Rewarding the best ideas, no matter where they come from

We called this "the Red Hat Multiplier" because we discovered that individuals who embody these behaviors are so influential that the impact of their leadership capabilities is multiplied.

The Red Hat Multiplier helps us articulate what open leadership looks like at different stages of a leader's development and highlight clear development areas for people who want to become leaders—whether they want to be better managers or more influential individual contributors. It also helps us provide guardrails and guidance on what success as a leader looks like.

While some people are more naturally inclined to behave in this way than others, each of the five behaviors is a skill that anyone can build and develop.

Indeed, many people say that they thought they were "collaborative" or "transparent" before they joined our open organization, but now, they practice those skills at a level they could never have conceived of in a conventional organization.

The Red Hat Multiplier competency model is available on GitHub[43] and published under a Creative Commons license, so you can download a copy and share it with your organization.

Our open leadership system is a work in progress, and these are just a few of its many parts. You can learn about another component, our Open Decision Framework, in another chapter of this manual.

DeLisa Alexander serves as the executive vice president and chief people officer of Red Hat, leading the organization responsible for global human resources including Red Hat University. During her tenure, Red Hat has grown from 1,100 to 9,000+ associates and has been recognized as one of the best places to work in multiple publications around the globe.

43 https://github.com/red-hat-people-team/red-hat-multiplier

11 steps to running an online community meeting

Laura Hilliger, Greenpeace International

Open organizations explicitly invite participation from external communities, because these organizations know their products and programs are world class only if they include a variety of perspectives at all phases of development. Liaising with and assisting those communities is critical. And community calls are my favorite method for interacting with stakeholders both inside and outside an organization. In this article, I'll share best practices for community calls and talk a little about how they can spur growth.

What is a community call?

You might think of community calls as office hours for particular themes, or as design sessions for programs. A community call is a meeting, held online, that invites people to gather at a specific time each week or month. They're recurring and open to anyone who wishes to join. A community call is a tool for solving problems, breaking out of individual silos, and finding points of connection between different initiatives or people. Most importantly, a great call serves as a launchpad for communities. Community calls bring people together from all over the world. They serve as a social and cultural touchstone. It's all about connection.

How does a community call develop leadership?

A community call demonstrates transparency and collaboration. Invite others to speak. Facilitate a conversation. Don't give a presentation. A good community call invites people to have ideas, speak their minds and talk about their own work. Good leaders promote action, build partnerships, motivate, and empower. A community call develops these skills through thoughtful and fun facilitation. Community calls thrive on open practices. Open planning, documentation, and open reflection are essential components.

Running a community call

0. Commit

To plan, execute, and run a successful community call, you'll need to commit a bit of time and energy. In the beginning, you'll need a day to think about and document what you hope to achieve, and you'll need another day to do logistical setup and promotion. If your call is successful, you'll need several hours for each call. You will need an hour to write the agenda each week or month, time to promote, an hour to run the call, another hour to write a reflection, followed by more promotion. A successful community call is a production, but as you get used to it and as your community grows, this will become second nature.

1. Determine your community's identity

If you're planning on running a community call, you need an idea of the community you're trying to build. Of course, your target audience is "everyone," but to gain traction, you need to reach influencers first. Define what you hope to "get out" of the call. This will focus your community. I'm currently running a community call that focuses on using stories to create impact. I focus on people who are creating impact with a specific story, people who are interested in Greenpeace and the 7 Shifts towards Open[44].

2. Record the purpose of your call

You're going to be asking people to join your community call. How will you pitch it to them? Write a few sentences summarizing what your call is about. You can use these sentences to help you promote the call. For example:

> Our community call surfaces real world examples that embody the new Greenpeace Story and the 7 shifts. We want to make this community a network that can engage around all things story.
>
> We hope to celebrate one another, identify gaps in knowledge, and share skills. We serve as a peer group for developing campaign ideas and breathe life into the stories we tell at Greenpeace. We want to build campaigns that sing, dance, dream, laugh, and otherwise grasp the Story and Shifts.
>
> People will be invited to bring what they're working on or need help. We hope people bring story ideas with the aim of improving campaigns, actions and engagement. We see this as a fast, loose way to collaborate and innovate.

44 https://opensource.com/open-organization/16/1/greenpeace-makes-7-shifts-toward-open

3. Pick a date

Before promoting your call, you need to schedule it! Choose a date and a time when most folks are likely available. Do most members of your community have day jobs? Schedule the call for the early evening. Is your community based primarily in Europe? Plan the call at a time convenient for Europeans. There's no science to picking the best time. Just find a day/time that works for most of your community members.

4. Choose your tech

Next, select the particular technologies you'll use to gather everyone together. I recommend using video conferencing software. You can use anything from Appear.in to Zoom. Choose something your target community is already using and try it out. If they're all in a Google Community, try Hangouts. If you communicate via a specific forum or mailing list, use that list to ask people what they use for video conferences.

5. Write the agenda

You don't want to waste people's time, so you need a plan. If your community doesn't feel like the call is valuable, they won't come back. They also won't spread the word, and your community call will have no...community. Balance your agenda. Provide enough presentation so so people have something to respond to, but offer enough time for interaction, too, so people feel invited to speak. Use a collaborative note taking device (like etherpad) to plan your call. This is the place you can store the logistical information (when the call is, how to connect, etc). It also serves as a living document for note taking and collaboration.

To help you envision what a community call might look like, I made you a template[45]. Insert your own call information and themes to talk about, and you're ready to go (don't forget to copy and paste this into your own etherpad!)

6. Reach out to influencers

To grow your community call, you need to find like-minded people who are interested in the topics. They can help you spread the word. They are also the people most likely to have the skills necessary to collaborate or discuss "the work." For example, the story community call is open to everyone, but I focus promotional efforts on people who understand (or at least know) what "story as a theory of change" means. Generate a list of influencers speaking prominently on your call's theme, then reach out to them individually. Ask them to attend your call. The personal and specific ask is much more powerful than a mass email. This is a critical step!

7. Promote your call

In the two weeks leading up to your call, you'll want to share your agenda widely. Use social media to promote your call, send personal messages and emails to lists. Ask people to come to your kick-off call. Involve your community members from the beginning. Ask their opinions. Ask for input. Not sure about how you would write an email that invites people to a community call? No worries. Here's another template[46].

45 https://greenpeace.titanpad.com/community-call-template

46 https://greenpeace.titanpad.com/community-kickoff-draft

8. Arrive early

Load up your agenda and connect to the video or phone conference at least 15 minutes before everyone else is scheduled to join you. You can prepare your opening, make sure the tech is working, and be ready when people start to arrive. Give people some time to connect. I usually "officially" start the call at about five minutes past the scheduled call time. In the meantime, welcome people to the call and explain how to use the etherpad for those who are connecting.

9. Be a superstar moderator

When you're ready to start the call, begin by welcoming your participants and reviewing the meeting's purpose. Explain how to use the Etherpad. Explain how the call works. Let people know you encourage their participation! Give an overview of the agenda and ask participants to help you take notes. During the call, invite others to speak. If someone is getting off topic, gently refocus the conversation. Listen. I can't stress this enough: *Listen to your community.* Make sure you take notes, too! When your time is up, invite people back by informing them of the next call. And don't forget to say "thank you!"

10. Write a reflection

Here's where the notes come in handy. Documentation is integral to open organizations. A community call can help you make decisions, advance ideas, and assign tasks, but only if you take care to document your conversation and follow up! Write a personal reflection after each call. Just read the notes and write down what the call experience was like for you. Write your reflections soon after concluding the call, so you remember what you felt, what the conversation covered, and how people interacted. Then, as you begin promoting your next community call, share the new agenda as well as the reflection.

I love community calls. I've been attending them and running them for a long time. Read about my experiences on my blog[47]—or get in touch[48]!

Laura Hilliger is an artist, educator, writer, and technologist. After five years at Mozilla, where she advocated for open and helped spread web literacy, she's now an Open Organization ambassador at Opensource.com and working to help Greenpeace become an open organization. She's all over the Web. Use your favorite search engine to learn more about Laura and what she does.

47 http://www.zythepsary.com/?s=community+call

48 http://laurahilliger.com/

Making open and inclusive decisions

Rebecca Fernandez and DeLisa Alexander, Red Hat

In a start-up organization, anticipating how a decision will impact the people you work with is relatively easy. If you don't know, you just ask them, then make adjustments accordingly. Open conversations like these are an intuitive and expected practice in most start-up environments.

Yet as an organization grows to include more and more people, sustaining that open and inclusive culture becomes difficult. Those sorts of practices begin to fade away if you don't deliberately work at cultivating them.

It's a cultural change that happens gradually as the organization becomes more complex, and people often fail to notice until those closed, siloed behaviors have become entrenched in the organization. You see one of two reactions to this cultural change:

1. Some people accept this loss of transparency and engagement with a pragmatic shrug. They say, "Well, we're not a startup anymore, and we can't act like one forever."
2. Others leave the organization and say that the culture is too "corporate" for their liking. They pack up their belongings and their talents, and they begin anew with another startup.

At Red Hat, we've struggled with the same issue over the years, and we've seen our share of both reactions. After all, our company has grown from two guys in a townhouse to more than 9,000 associates around the world.

Fortunately, our company is strongly rooted in the open source movement, where acting openly is the norm and the expectation. When we were a startup, many of our associates came from open source communities, and many of our new hires today continue to come from open source communities. That's created, essentially, a cultural mandate: to figure out how to sustain and scale what makes our company special, as we continue to bring in newcomers from many different backgrounds.

Understanding our own best practices

We've developed one effective tool for doing this: the Open Decision Framework, a collection of best practices for making decisions and leading projects at Red Hat.

The Open Decision Framework contains the collective wisdom of Red Hatters, compiled into a flexible framework that helps our decision makers and leaders seek out diverse perspectives and collaborate across teams and geos, to make better decisions.

Open source principles like transparency and collaboration are the building blocks for these principles. In true open source fashion, we've come to realize that many of the practices originated in or were adapted from open source projects and communities to which Red Hatters contribute.

When you apply the practices in the Open Decision Framework to decision-making and project leadership, you get better ideas and a clearer understanding of the impact of your decisions—while building trust and respect between teams. You're able to tap into the passion and creativity of your organization—while keeping the process productive and maintaining accountability for decision-making and execution. And you retain much of the transparency, inclusivity, and agility that most organizations lose as they grow—while sustaining speed of execution and delivering extraordinary results.

The power of open

You can find the Open Decision Framework on GitHub[49], where it's available under a Creative Commons CC-BY-SA 4.0 license. We chose to publish the framework on GitHub because it's a place where many open source enthusiasts congregate—and is a place where anyone can download a copy, remix it, translate it into another language, make suggestions for improvements, track the changes that we make to the upstream version and others make to their own "forked" versions over time, and more[50].

We're seeing project managers and leaders download, adapt, and use it in interesting ways within their own organizations and communities.

At Greenpeace International, Staff Engagement Advisor Laura Hilliger had long been an advocate for open culture and leadership practices. She remixed the Open Decision Framework and presented it to the steering committee working to overhaul the organization's international web presence, Greenpeace.org, which reaches millions of visitors each year.

"The Open Decision Framework helped me convince them to run the project, which includes everything from user research to development to content, using open practices," Laura said. "It presents the whys and hows of open in a practical way."

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49 https://github.com/red-hat-people-team/open-decision-framework

50 As of this writing, 61 users are watching the repository, 441 have starred it, and 46 have forked it.

The project's stakeholders include the entire community of Greenpeacers (more than 4,000 staff members and tens of thousands of volunteers), the site's visitors, and potentially anyone who is interested in seeing how Greenpeace evolves their web presence for the future.

Laura put some thought into the ways she'd need to adapt words from the framework to fit her industry and organization's lingo. For example, while an open source company like Red Hat often uses the word "contributor" to describe members of our projects and communities, that word has a different meaning in the nonprofit world.

"The Open Decision Framework helped me define how an open method is different from the ‘regular' Greenpeace way of working, in a short and accessible way," Laura said.

Laura also wove a communications plan into her remixed version of framework, to help the steering committee see how it could be used within their project.

Another benefit that comes from leading an open and collaborative process is that it increases people's engagement and interest in your work.

As Laura explained, "The excitement has been building since the green light was given, and the team is promoting open while learning how to be open. Inspiring!"

Accelerating innovation and organizational change

Meanwhile, within Red Hat, we continue to see benefits using the Open Decision Framework to identify and share our own best practices across our open organization.

Within our engineering organization, for example, Vice President of Products and Technologies Operations Katrinka McCallum leads a team whose work regularly impacts every other department and many teams within each. Not surprisingly, Katrinka's team were contributors to—and early adopters of—the Open Decision Framework.

At the 2016 Red Hat Summit, Katrinka and Jay Ferrandini, Red Hat's Senior Director of Worldwide DevOps, presented "Lessons learned on the DevOps front[51]," where they shared their experience with practicing open decision making.

A few years ago, the leader of one of the Red Hat's engineering development teams explained that Jay's operations team had a problem. "We come to you, asking for a banana," the leader explained. "And your team works within a black box, and after a while, you deliver us a pickle."

A pickle?

Katrinka explained, "We were really good at working through problems. We would spend months working on a problem, and then we'd deliver this beautiful pickle. We would deliver it with fanfare, with prideful joy that we were solving their problems."

The development team would look at the pickle in surprise and say, "Well, that's sort of what we wanted . . . except it's not yellow. And we wanted something sweeter. And we can't peel a pickle."

Jay and Katrinka realized that they needed to make some fundamental changes to their team's process for and mindset about working with other teams. They realized they could apply open source principles—like transparency, collaboration, open communication, and participative decision-making—to bring the development and operations teams together and deliver better solutions.

So the DevOps transformation and enablement team was born.

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51 https://www.youtube.com/watch?v=vyirF0fYtEY

Jay's team adopted a number of practices documented in the Open Decision Framework:

- transparency with internal customers and other stakeholders
- customer involvement
- gaining feedback and adapting iterative changes
- building trust and respect via collaboration

For example, the team began to make customer participation a requirement for working on a project. When a development team asks his team to solve a problem, Jay explained, "We'll probably say ‘yes,' but only if you give us one of your people to sit in our meetings with us."

Now, instead of gathering requirements and vanishing into a "black box" for six months to build a solution, Jay's team brings members of the development team into the process along with those business requirements.

"At minimum, we might need just 15 minutes a week, where our business partners are participating in our meetings and scrums," Jay said. "But we're finding that often, these folks have the appetite and interest to get right in there and work on the code with us. It's a way more fun and productive environment, and people want to come work with us."

This open, inclusive, embedded model helps the team ensure, from start to finish, that they're solving their customers' problems. In other words, it helps them consistently build and deliver bananas, rather than pickles.

The team started out as a service organization, essentially "a call center," according to Jay. By practicing open decision making, the team became known as a trusted business partner.

Jay's team also decided early on to be transparent about their own challenges and limitations—another best practice found in the Open Decision Framework. This inspired other people to raise their hands and volunteer to help the newly formed team succeed.

As Jay explained, "People came out of the woodwork with offers to help. We went from closed to completely open, and almost overnight, people saw that we were human, and they began to trust us."

The team's open approach has helped them became a catalyst for collaboration and improved decision-making across the larger Products and Technologies organization.

In one instance, they brought four disparate groups together, helped them let go of four different message bus technologies, and aligned everyone's requirements onto a single, shared message bus.

"We had these teams using four different modes of communication, you could think of it as speaking in four different languages," Katrinka said. "Once we got everyone to standardize on this one common infrastructure element, we saw all kinds of benefits. Bugs were getting fixed that had never been addressed before."

In essence, the Products and Technologies organization moved from all speaking different languages within their teams —and employing translators when they needed these teams to work together—to speaking in a common language.

This was a much more efficient system and freed up thousands of person-days of work per year, so the teams could spend more time on higher value-add tasks.

None of this would have been possible without an open and inclusive approach to making that technology decision. As Katrinka said, "Being open and transparent is a smoother way to operate."

The experiences of the Products and Technologies Operations team are just a few of the sources of wisdom found within the Open Decision Framework, and the team has made improvements based on other teams' contributions to it, as well.

Katrinka said, "If we've learned anything from open source, it's that even if you're the smartest person in the room, you aren't smarter than the whole room. Solving problems together builds lasting partnerships that allow you to solve even bigger problems together in the future."

The Open Decision Framework offers insights on how to scale that kind of open and inclusive approach.

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DeLisa Alexander serves as the executive vice president and chief people officer of Red Hat, leading the organization responsible for global human resources including Red Hat University. During her tenure, Red Hat has grown from 1,100 to 9,000+ associates and has been recognized as one of the best places to work in multiple publications around the globe.

Join the Conversation

Additional resources

Discussion guides

Want to start your own *Open Organization* book club? Download free *Open Organization* discussion guides for help getting started. Just visit opensource.com/open-organization/resources/guides.

#OpenOrgChat

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

The *Open Organization* FAQ

Since publishing *The Open Organization*, Jim has received many questions. We collected the most frequent ones in the *Open Organization* FAQ at Opensource.com, located at opensource.com/open-organization/resources/faq.

The *Open Organization* email list

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

The "Open Organization Highlights" newsletter

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