

The Open Organization Leaders Manual

The Open Organization Leaders Manual

Instructions for building the workplace of the future

Second Edition

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

3 <http://overpassfont.org/>

4 <https://www.libreoffice.org/>

Additional reading

From Jim Whitehurst

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

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

From the open organization community

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

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

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

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

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Preface to the second edition

Bryan Behrenshausen

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Preface to the first edition

Bryan Behrenshausen

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 1, "New Attitudes," explores ways that leaders have begun adapting their thinking—the ways they've let open principles seep into their definitions of leader-

ship and guide their missions. Part 2, "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.

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Introduction to the second edition

Jen Kelchner

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Introduction to the first edition

Dr. Philip A. Foster

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

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

However, in the late 20th century, something began to change. New technologies opened doors to globalism and thus more dispersed teams. The way we engaged human capital began to shift, forever changing the way people communicate with each other. People inside organizations began to feel empowered, and they demanded a sense of ownership of their successes (and failures). Leaders were no longer the sole owners of power. The 21st century leader leading the 21st century

organization began to understand empowerment, collaboration, accountability, and clear communication were the essence of a new kind of power. These new leaders began *sharing* that power—and they implicitly trusted their followers.

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

So leaders are becoming open, too.

Control

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

Communication

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

Trust

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

Autonomy

Where the powerful command-and-control 20th century leader is focused on some *position* of power, an open leader is more interested in the actual *role* an individual plays within the organization. When a leader is focused on an *individual*, they're better able to coach and mentor members of a team. From this perspective, an open leader is focused on modeling behaviors

and actions that are congruent with the organization's vision and mission. In the end, an open leader is very much seen as a member of the team rather than the *head* of the team. This does not mean the leader abdicates a position of authority, but rather understates it in an effort to share power and empower individuals through autonomy to create results.

Empowerment

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

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

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

September 2016

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

Part 1

Planning & Goal Setting

Chapter title

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Developing a culture of experimentation on your team

Catherine Louis

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

A brief example: Dollar Shave Club

Dollar Shave Club's hypothesis was that men don't need fancy razors with lots of fancy features, nor do they want to spend time shopping for them. Their experiment involved creat-

ing a one-minute video⁵ sharing the problem and offering a solution by inviting viewers to link to a landing page where they could place an order. Within 48 hours, they knew the experiment worked: They had received more than 12,000 orders.⁶

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

5 <https://www.youtube.com/watch?v=ZUG9qYTJMsI>

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

Part 2

Organizational Design & Culture Building

Chapter title

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Part 3

Motivation & Engagement

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The Tao of project management

Allison Matlack

The Tao Te Ching⁷, believed to have been written⁸ by the sage Lao Tzu⁹ 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).

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

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

9 <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.¹⁰

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 institutions¹¹ can teach you how to manage projects very well, and these are good skills to have.

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

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

11 <http://www.pmi.org/certification/project-management-professional-pmp.aspx>

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

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

Connect the right people

We join spokes together in a wheel,
but it is the center hole
that makes the wagon move.¹²

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

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

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

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

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

Trust your team

When the Master governs, the people
are hardly aware that he exists.
Next best is a leader who is loved.
Next, one who is feared.
The worst is one who is despised.

If you don't trust the people,
you make them untrustworthy.

The Master doesn't talk, he acts.
When his work is done,
the people say, "Amazing:
we did it, all by ourselves!"¹³

Rebecca Fernandez¹⁴ once told me that what differentiates leaders in open organizations is not the trust people have *in them*, but the trust *they have* in other people.

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

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

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

14 <https://opensource.com/users/rebecca>

Be effortless

The Master does nothing
yet he leaves nothing undone.
The ordinary man is always doing things,
yet many more are left to be done.¹⁵

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

Don't be that person.

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

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

Be *that* person.

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

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

Be a culture coach

When a superior man hears of the Tao,
he immediately begins to embody it.
When an average man hears of the Tao,
he half believes it, half doubts it.
When a foolish man hears of the Tao,
he laughs out loud.
If he didn't laugh,
it wouldn't be the Tao.¹⁶

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 daydreams¹⁷ about how companies should run. They told me things couldn't possibly be as they seemed. They said I should investigate further.

So I did.

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

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

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

17 <https://opensource.com/open-organization/15/9/reflections-open-organization-starry-eyed-dreamer>

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

Kaizen

In pursuit of knowledge,
every day something is added.
In the practice of the Tao,
every day something is dropped.
Less and less do you need to force things,
until finally you arrive at non-action. When nothing
is done,
nothing is left undone.¹⁸

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 kaizen¹⁹, or "continuous improvement." Don't be afraid to try and fail. Failing is the label

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

19 <https://www.kaizen.com/about-us/definition-of-kaizen.html>

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

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

Practice

Some say that my teaching is nonsense.

Others call it lofty but impractical.

But to those who have looked inside themselves,
this nonsense makes perfect sense.

And to those who put it into practice,
this loftiness has roots that go deep.²⁰

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

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

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

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

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Appendix A

The Open Organization Definition

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