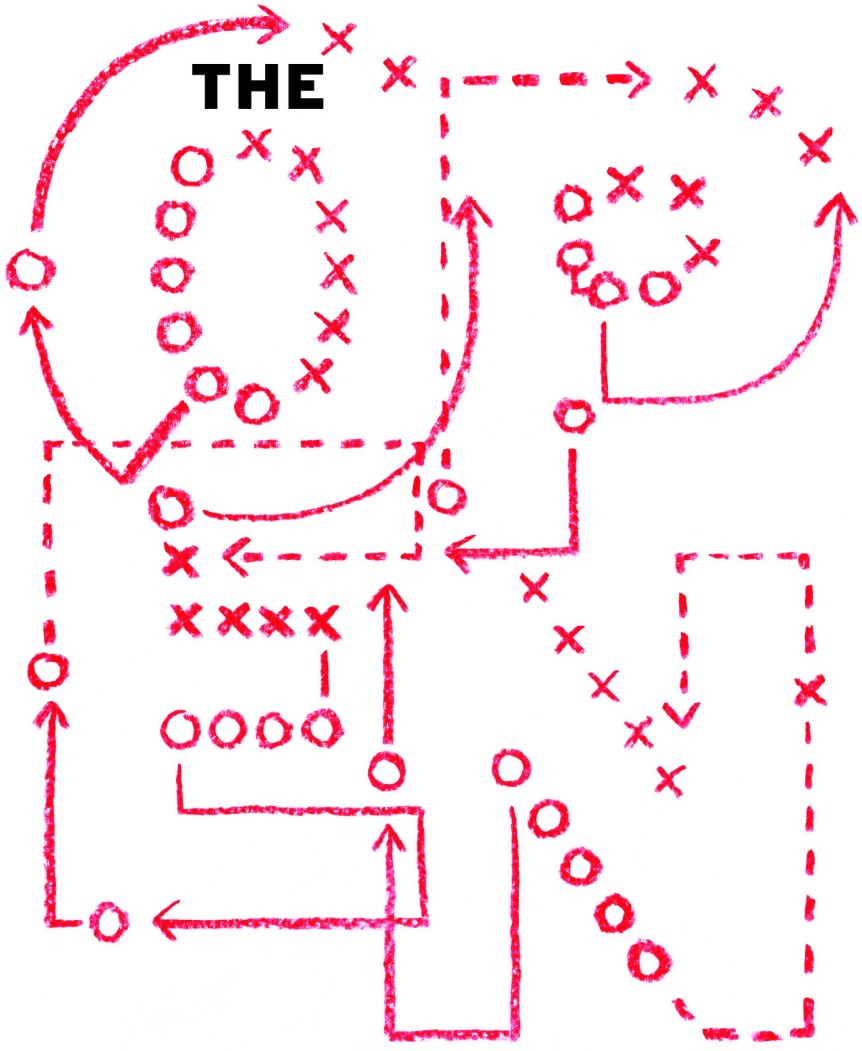

ORGANIZATION

LEADERS MANUAL

A handbook for building innovative and engaged teams

SECOND EDITION

The Open Organization Leaders Manual

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A handbook for building innovative and engaged teams

Second Edition

With an introduction by Jen Kelchner

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Colophon

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2 https://dejavu-fonts.github.io/

3 https://github.com/RedHatOfficial/RedHatFont

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 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)

Every week, Opensource.com publishes new stories about the ways open principles help innovative leaders rethink organizational culture and design.

Visit opensource.com/open-organization to read more.

Contents

Preface to the second edition

Bryan Behrenshausen

I know "leaderless organizations" are all the rage these days, but I have to confess that I've never seen one. To be perfectly honest, I'm not even sure I could *imagine* one. I get the sense that "leaderless organization" sits alongside "open floorplan" and "paperless office" in the pantheon of buzzy but ultimately untenable workplace neologisms.

Any time an organization materializes—any time a group of actors gathers to accomplish something collectively—leaders emerge. Organizations are collections of relationships, and any ability to shape those relationships (to hold them together or break them apart or channel them in a particular direction) is a leadership ability. Without leaders, connections don't last long. Without connections, organizations don't stay organized. A leaderless organization is no organization at all.

What most pundits tend to call "leaderless organizations" seem to be those organizations in which leadership *looks* different—organizations in which the title of "leader" has been successfully dissociated from formal position in an organizational schema. Leaders can (and do) arise from multiple locations in the collection of connections we call "an organization," not just the tip-top boxes on a pictorial mapping of that organization's hierarchy (this has always been the case, though contemporary organizational theory and design is much better about recognizing it). When we acknowledge that the term "leader" can potentially apply to *any* organizational actor, not just the select few for whom we've historically reserved the label, our approaches to recognizing, understanding, and training leaders need to change.

As the chapters in this book amply demonstrate, the best way to think about leadership today—indeed, the best way to *become* an organization leader in one's own right—is to adopt a perspective on leadership informed by open principles. The authors gathered here have all endeavored to re-imagine some of the most common connection-influencing activities in light of those principles. The work is part of a much broader effort from a global community of writers, theorists, consultants, managers, and other leaders thinking about the ways open values continue to reshape organizational culture, and by reading this volume you've already become part of it. For starters, you can share, remix, translate, and add to this book—or any of the Creative Commons-licensed books in the *Open Organization* series for that matter.[5] You can also join us at Opensource.com to continue our conversation.

We await your influence.

Bryan Behrenshausen is a writer and editor at Red Hat. He manages the Open Organization section of Opensource.com, supports the Open Organization Ambassador community, and edits the Open Organization *book series.*

5 https://github.com/open-organization-ambassadors/open-org-leaders-manual

Introduction to the second edition

Jen Kelchner

Disruption is "existential," notes an article from professional service provider Wolters Kluwer.[6] It's not just an organizational design issue. It cuts straight to the core of *who* we are, *how* we see ourselves, and *what* we contribute to our environments. Today, the furious pace of disruption is forcing executives to make existential decisions and commit to them much faster than they've anticipated.

One source of that disruption is digitization. Digitization is reshaping the way we lead, manage, and work. Even in the scope of the last decade, we've seen rapid adjustments to how we live, connect, and receive services. While we've been discussing *ad nauseum* how (or whether) we should be redefining organizational cultures and business models, the clock has been ticking, and the pace of digitization has not been slowing. In his book *The Digital Matrix: New Rules for Business Transformation Through Technology*, author Venkat Venkatraman argues that, by 2025, differences between digital and non-digital functions, processes, and business models will no longer exist.

So what's the top priority for leaders in business today? Understanding the existential impacts digital transformation is having on every aspect of human life, and addressing the immediate need to reshape the way we work, organize, and do business. In other words: changing our organizational cultures and developing people capable of thriving in these conditions.

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6 https://wolterskluwer.com/company/newsroom/news/2018/10/lessons-in-leading-digital-disruption.html

It'll take nothing less than immediate action. We need to change the way we work and lead our organizations into this new era.

But culture change is hard, and organizational redesign takes time—at least, that's what nearly every leader says when we agree change is either necessary or inevitable. The major problem is not that we can't agree change is needed; it's that we're standing on past methodologies, processes, and mindsets to make decisions about how to address and engage the change of today and beyond.

Why is this observation so critical?

Old playbooks and models (for leadership, for business, for people development) that have previously garnered success are no longer effective. Relying on these, I often say, is like expecting your emerging technology to work on the bandwidth and speed of dial-up service from 1997. They're not quite up to the task of meeting speed, demand, and performance outcomes. Contemporary "best practices" are unable to meet the demands of the *present*, let alone the *future*. We require new ways of doing things in order to lead in the digital age of rapid change. In fact, I would argue that your success beyond 2020 depends on them.

So if we agree we need to change and develop competencies for engaging rapid change, then how do we proceed?

Open principles and processes—*and ultimately open organizations*—are vital to the success of digital transformation efforts. By creating space for the key tenets of open (transparency, adaptability, collaboration, inclusivity, and community) to be infused in our workplaces, we can then begin to engage change continuously throughout the entire organization (not just on your DevOps teams).

Change needn't be difficult. It is only as difficult as we choose it to be. As leaders, we are ultimately responsible for empowering those around us to engage change, new information, and uncertainty with a measure of ease. We need to guide them as we discover the new details, to provide support as routines are disrupted, to help new voices be heard, and to create places where people feel they belong to something greater.

The "simplest" entry point for large-scale change in your organization the way your teams work and the processes they use to solve problems. As Jim Whitehurst writes in *The Open Organization*, while conventional organizations utilize a top-down approach to driving change, open organizations take a bottom-up approach to addressing what they do, how they do it, and why they do it. This means (among other things) beginning the work of culture change by fueling passion and uniting everyone under a common purpose while sourcing collective wisdom and collaborating to turn the great ideas into actions. Only then can our organizations function as fully engaged and empowered ecosystems catalyzed by inclusive decision-making.

Open (and all that open entails) is also the key to our global future.

Implementing open values, principles, and processes into all facets of our lives—such as culture (both organizational and societal) education, access to information, co-creation models, engineering, and computing—is the best way to build a balanced and free society that paves the way not only for future technological advances but also new ways of working together to build our world.

If you're still uncertain about the value of openness, I would immediately point you back to the very book you're currently reading. It's a prime example of how an open, collaborative, inclusive project works. A distributed group spread across multiple industries, with varied experiences and working styles, can combine their individual talents to co-create a valuable resource based solely on a shared set of well-defined values in a community (see Appendix).

As you continue learning about open leadership—and, ultimately, *open culture*—this book will provide tools and insights you can use to begin changing how you work.

December 2018

Jen Kelchner is the Founder of LDR21, a firm focused on building agile, open people and organizations who are able to meet the demands of continuous cycles of change. She advises organizational leaders on open leadership, cultures of trust, and engaging change based on open org principles.

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 be-

lieve in their own abilities. Followers who believe that they have personal power are more likely to undertake initiatives, set and achieve higher goals, and persist in the face of difficult circumstances. Ultimately the concept of an open organization is about inclusivity, where everyone belongs and individuality and differing opinions are essential to success. An open organization and its open leaders offer a sense of community, and members are motivated by the organization's mission or purpose. This creates a sense of belonging to something bigger than the individual. Individuality creates happiness and job satisfaction among its members. In turn, higher degrees of efficiency and success are achieved.

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

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

September 2016

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

Part 1:
Planning & Goal Setting

Creating teams that aren't afraid to fail

Catherine Louis

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

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

Step one: Define your business goal

In general, there is no shortage of verbiage for defining business goals; however, as a starting point let's use Victor Basili's definition[7] of a conceptual goal:

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

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

1. "A goal is defined for an **object**": What are we discussing here? Could it be our issue tracking system? Could it be the relationship between the issue tracking system and customers? Whiteboard this to visualize where your scope is.

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

2. "For a variety of **reasons**": What's the problem that needs to be addressed? When we state a goal, we include the purpose driving the goal.
3. "With respect to various models of **quality**": What's the quality issue with which we need help, and why is it an issue?
4. "From various **points of view**": From whose viewpoint are we discussing this goal? Customer? Project Manager? Whose opinion matters?
5. "Relative to a particular **environment**": Where and when is the issue being reported?

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

Take this poorly written business goal, for example:

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

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

- "What kind of shopping is being abandoned?"—"Any cart that isn't purchased."
- "Why?"—"Because I said so."
- "What's the quality issue we need to address?"—"Just get the cart purchased faster."
- "Who's 'we'?"—"Me, your project manager."
- "Where and when is this being reported?"—"Everywhere. Anywhere."

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

When taking a question-focused approach to setting goals, be sure to start with the goal! The ultimate test of effectiveness for a

business goal is whether it motivates a team. A well-written goal stirs the blood.

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

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

Step 2: Ask questions about the goal

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

Some questions that come to mind are:

- Have we interviewed any shoppers about their shopping experience?
- How many clicks must users make from when they begin shopping to when they complete a purchase?
- Are non-North American markets not seeing these abandoned carts? Why?
- How long in duration is the average online shopping experience?
- Are the products presented in a clustered, attractive way versus being presented as one product per page?
- Are we using any advanced or custom filters which can improve on-site discovery and navigation?
- Do we support a fully-automated visual search for products?
- Do we understand the customer journey for ordering women's apparel online and how much time each step in the journey takes?

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

Step 3: Decide how you're measuring progress

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

Using our example above, we might target:

- **Results of interviews with 80 percent customers with abandoned shopping cart experiences.** Have we interviewed any shoppers about their shopping experience?
- **Cycle time and number of clicks per purchase.** How many clicks are needed from when someone starts shopping to when they complete a purchase?
- **Cycle time per client.** How long is an average shopping experience on our platform?
- **Number of products per page per category:** Are the products presented in a clustered, attractive way versus being presented as one product per page?

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

Step 4: Experiment

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

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

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

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

- **RESTATING THE QUESTION AS A HYPOTHESIS.** We believe that if we cluster our products in an attractive way, rather than looking at one product per page, more purchases will occur. (I recommend using the free Strategyzer test card[8] to help you organize your thoughts around creating your experiment once you have a hypothesis.)
- **KNOW YOUR RISKIEST ASSUMPTIONS.** One critical, risky assumption we're making is that more purchases will occur if different products are grouped in an attractive way. But what is an "attractive grouping," and to whom? Is it multi-colored blouses with neutral shoes? Is it blue shoes with white blouses? We'll need to experiment further to begin to answer this.

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

- **A/B TESTING**, a method of comparing two versions of a single variable—typically by testing a subject's response to variant A against variant B, then

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

determining which of the two variants is more effective.

- **Concierge testing**, or performing a service manually (just like a concierge at a hotel) with no technology involved. The idea here is to learn as much as you can via increased human interaction. A classic example of a concierge service is the beginning of AirBnB, where two guys rented out air mattresses in their home in San Francisco to validate what types of customers they might get with this type of service.[9]
- **Landing page**, a web page on which someone "lands" in response to some advertisement or social media campaign. The goal of a landing page is to convert site visitors into sales or leads. You can analyze landing page activity to determine click-through or conversion rates and gauge the success of the advertisement. One classic example of this method of experimentation comes from Buffer, which launched with just two pages.[10] The first was a link to "plans and pricing," and if users clicked that link, they received a message saying "oops, caught us before we were ready."
- **Video**, or some audio-visual artifact to explain your product. Telling a story from a user-centric point of view, including a call-to-action, is a wonderful way to test a hypothesis. Dropbox did this in 2008 creating a three-minute video posted to Digg, which expanded their waiting list from 5,000 to 75,000 literally overnight.
- **Wizard of Oz**, a method in which it looks like you have a fully functioning product/feature, but there's really someone "behind the curtain" doing all the work. A classic example of this test is Zappos. Founder

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

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

> Nick Swinwarm reserved the domain name and, without building any sort of inventory system, walked down the street to the local shoe store, took photographs of shoes, and posted them on the website.[11]

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

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

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

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

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

at a time and those same products displayed in summer color groups.

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

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

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

Owning your career in an open organization

Laura Hilliger and Allison Matlack

When we were children and people asked us what we wanted to be when we got older, we tended to choose professions with fancy uniforms. We wanted to be a firefighter or a police officer or an astronaut. In our teens, career aptitude tests produced broad, unspecific results telling us to work in healthcare or education. These insights also happened at a time before digital technologies fundamentally changed our world.

Today, those archetypal career goals are changing—and rapidly. As *The Economist* reports, we live in an era when roughly half of jobs are vulnerable to automation, and "14% of jobs across 32 countries are highly vulnerable, defined as having at least a 70% chance of automation."[12] Furthermore, "32% were slightly less imperiled, with a probability between 50% and 70%." As the magazine reports, "at current employment rates, that puts 210 million jobs at risk."

Advances in automation and machine learning mean that technologies can perform certain *manual* functions and tasks much more efficiently than humans can. As these and other new technologies begin freeing up some of the time we've historically spent on rote, manual work, many (if not most) of our careers are veering toward "knowledge work."

The knowledge industry is the invisible corpus that lies behind the financial industry, the technology industry, the healthcare indus-

12 https://www.economist.com/graphic-detail/2018/04/24/a-study-finds-nearly-half-of-jobs-are-vulnerable-to-automation

try, and every other industry that designs, builds, and manages our social world. It develops at pace with the technologies we invent. And it's much less prone to obsolescence. Artificial intelligence (AI) cannot perform knowledge work, for example, because AI lacks a fundamental human ability to be *imaginative* and *creative*.

Building organizations that can effectively utilize the creativity at the heart of knowledge work means following new blueprints. Organizations designed to foster efficient *manual* work take a shape familiar to all of us: logical, hierarchical, and structured around clearly delineated career pathways. Finding your way in them—evolving your abilities, locating new possibilities for challenge and advancement, and continuing to make yourself relevant to them—is fairly easy to do. Just follow the organizational chart, practice the prescribed skills, and take advantage of the training courses neatly curated by the HR department.

In the 21st century, your ability to be truly innovative means AI can't easily replace you. But it also means you'll be working in an organization designed around new principles: agility, flexibility, and ambiguity.[13] Organizations built on these principles don't look like the organizations built decades ago. They're more adaptable, more fluid, more transparent—that is, more *open*. And jobs in the knowledge economy aren't always predefined (if they're defined at all). So how can you take responsibility for your career in environments so full of ambiguity?

How can you assume ownership of your career in an open organization?

Know thyself

The best place to start is by becoming familiar with your own goals, aspirations, and learning style. Then you're more likely to find the support you need because you'll know what kind of mentorship to seek out.

13 See Heidi Hess von Ludewig's chapter on creativity in this volume.

New organizational models—especially those built on open principles—are becoming common across industries for a variety of reasons. One is that knowledge is something that develops through *input*, and an open organization provides fertile ground for copious input. Your mentors and experiences in the workplace, from networking (including the late night drink with a colleague!) to failed projects, successful initiatives, email threads, or confusing meetings—all of these experiences provide your brain with useful input. Your brain forms (and distorts) memories from this input and you learn. Open organizations keep that input flowing.

Another reason career paths are much more flexible and fluid in open organizations is because the organizational structures *themselves* tend to be more flexible and fluid. Nowadays, you need to carve your own path through a networked organization, not just "move up" some predefined corporate ladder. This is where that input becomes even more useful.

Reflecting upon what and how you learn in your working life is a fundamental part of succeeding in an open organization. In order to "own" your career, you have to "own" yourself—that is, understand the inputs you're receiving and recognizing ways those inputs can be combined and reordered to create new knowledge. New knowledge is the currency of the knowledge economy.

So how do you think?

Are you someone who needs to have a complete picture of a situation or process in order to perform a task, or are you the kind of person who can focus purely on a specific area and still get the job done? Knowing how your brain works is fundamental to career goal setting and planning. And it helps you identify the gaps in your organization that you are uniquely suited to fill.

The more we reflect, the more clearly we can see how we'll each need to work as we set off on our individual career paths. Continuing our example from above: If you're a person who cannot operate without full context, your ambitions might be best set on leadership types of roles. But if you perform better with laser-like focus, you might be better setting career goals in functional

applications. The important thing to remember is that each of us defines our own measure of success—but those measures only become apparent when we've done the work of understanding our learning styles.

This type of reflection will prevent you from making the same mistake twice, which means that as you advance in your career, you'll develop a reputation for constant improvement. Constant improvement of your skills and active learning about yourself are integral to success. Even with regard to functional applications, there's always a new framework or trend to explore. In short, those who stop bettering themselves get left behind no matter where they are on the corporate ladder.

What do you want to learn? Creating a balance between understanding yourself and learning specific skills and competencies that support your overarching career goals will help you lay out a path that makes you happy. And your happiness in any organization should be your top priority.

Find support

The good news is that you're a continual work in progress. You have permission to keep exploring different options through the various phases in your career. The bad news is that it's not always easy to figure out how to find a lucrative career path that makes you happy, especially when career paths in open organizations aren't always well defined. Sometimes we have to chart new territory *together* in the constantly changing knowledge industry.

It's simple to *say* you should "own your career"—to use your unique set of skills, experiences, and knowledge to solve complex problems that excite you. But it's not always so simple to *do* for a number of reasons:

- What if you're just starting out and are so exhausted from trying to answer the question of what you want to be when you grow up (assuming that astronaut thing didn't work out) that you don't have any energy left for this kind of of self-reflection?

- What if you aren't sure what you want to learn more about?
- What if you have no idea what career possibilities are available to you, even in your own company?
- What if your dream job hasn't even been invented yet?

You're in luck if you find yourself with a supportive manager who invests time in helping you navigate your professional and personal development. But all is not lost if you're on your own. Maybe you're an entrepreneur or freelancer working for yourself, or maybe your manager's strengths are in areas other than people development (like strategy). You'll just need to rely more heavily on your network: your mentors, coaches, and advocates—the people you look up to who can be compassionate mirrors to help you identify where you need to focus your development efforts. You'll be surprised at the kind of insights your colleagues and peers will have! Don't be afraid to ask people what they think.

Here's one easy, step-by-step method for starting the conversation:

1. Arrange a video conference with a few people you respect and trust.
2. Let them know you want to have a candid conversation about your strengths and areas of opportunity as part of your work on your personal development plan.
3. Introduce everyone and give each person a few minutes to talk about their work (maybe you'll find similarities and connections between these folks).
4. Introduce the concept of "Yes, and..."[14]
5. Ask each person the simple question, "What do you think my strengths are?" (and take notes).
6. Thank everyone for their time!

There are several variations of this suggestion, depending on your preferred communication style and comfort having these types of conversations. For example, if you're more comfortable talking

14 https://en.wikipedia.org/wiki/Yes%2C_and...

with others one-on-one, schedule several individual meetings rather than one group session. Or do it in written form; you can ask outright in an email, or do it anonymously via surveys.

This strategy might feel uncomfortable, but your trusted colleagues will *happily* point out what you're good at, and you might learn something you didn't realize. You can also ask questions like "What's one thing that would make me more efficient at my job?" and "What are my blind spots?" And then be open to the answers you receive.

And managers: Don't be afraid to take risks (calculated ones!) to allow your team members to experiment with different roles that bring them joy. The creative people—the inventors—need freedom and support so they can explore the ways they can be of most value to your organization, which requires trust from all parties involved. The most important things you can do are to clearly articulate your vision so your team knows which direction to go and then purposefully create a culture of feedback and continuous improvement so your team feels safe being vulnerable with you and each other. After all, it's difficult to grow without being vulnerable.

Here are some different techniques you can use to create a culture of feedback and continuous improvement:

Schedule a weekly team meeting and include standing agenda items that allow for retrospectives. What did we do well last week? What was frustrating last week? What you want to learn this week?[15]

Have candid one-on-one meetings with your team members. Tell them how their work makes you feel. Showing vulnerability will help others be vulnerable.

Have your team use "stoplight feedback" when presenting ideas or plans. Ask a team member to introduce an idea, then write "red," "yellow," "green," and "blue" on a whiteboard or in a collaborative document. These colors mean the following:

15 See Curtis A. Carver's chapter in this volume.

- Red: "I disagree with this piece of the idea/plan because…"
- Yellow: "I have concerns because…"
- Green: "I love this because…"
- Blue: "This is missing!"

Next, facilitate a discussion to gather feedback. As team members share, have them categorize the type of feedback by writing it under one of the colors. For example: "I'm not sure about how stakeholders will react to that logo placement." Write that under yellow. "The integration won't work that way because…" Put that under red. Or, "The DIY manual you sent is great for onboarding too!" That goes under green.

Develop a fail-forward mentality and help your team have one too. View mistakes as learning opportunities—because that's exactly what they are. Making a mistake on your team should be acceptable, as long as everyone learns from it.

View mistakes as a collective phenomenon. Individuals don't set out to make mistakes; mistakes just happen. You can dissect a mistake and try to find a root cause and learn about different perspectives. Use a "why" strategy to discover them ("Why did the Titanic sink? Because it hit an iceberg." "Why did it hit an iceberg? Because it was going too fast at night." "Why was it going too fast at night? Because the timeline to get to New York was too short.").

Take time to recognize accomplishments, even the ones that seem small in comparison to all the work that's left to be done.

Learn constantly. Encourage your peers and your team to do the same. There are several ways to make learning engaging:

- Start a book club on your team and read an appropriate text, then discuss it in a monthly or quarterly meeting. Fridays can be good for book club meetings.
- Ask people about their personal learning and hobbies and check in on them ("So did you get your dry-suit diving certification yet?").
- Invite external speakers to do Q&A sessions about their work with your team.

- Ask another department to run a workshop for your team.
- And ask your team for more ideas!

As you try some of these strategies with your team, don't be afraid to have open conversations about professional and personal skill development. And remember that the most valuable work comes from people who are happy and in roles that allow them the flexibility and freedom to do what they love to do.

Machines we are not

As automation becomes more prevalent and knowledge work more ubiquitous, we have more opportunity than ever to marry our passion and imagination in addressing problems of global scale. We can *choose* what we want to learn and what we want to work on. And most incredibly, we can change our minds at any time and still have impact in the world.

What's most important is that we take the time to reflect on what success and happiness mean to us personally, so we can confidently step into ambiguous problem spaces knowing we'll be okay. People aren't machines. They're complex beings with an immense aptitude for development and change. Creating an environment where that kind of change is supported and celebrated is critical for open leaders hoping to support knowledge workers and empower them to own their careers.

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Setting goals transparently and collaboratively

Michael Doyle

In any organization, everyone is ultimately working together to realize a vision. We can often lose sight of this fact when we get stuck in the day-to-day. Instead of working seamlessly together, we can often create friction as we bump against each other. We might not instantly understand how *our* work and *the work of others* are contributing together to a unified picture.

But if we pull back for a moment and reflect on how our work serves others in the broader context of the organization's vision, then we can begin to realize the importance of inviting others into our personal goal-setting processes. By doing so, we help others not only understand how our work contributes to a vision but also see their place within it.

The Open Organization includes an entire chapter on making inclusive decisions, and it outlines the benefits of doing so. Goal setting is just another form of decision making, one that involves determining where you intend to focus your energy to achieve anticipated results over a defined period of time. Whether you're an individual contributor, a manager of a team, or a director of multiple teams, the benefits of setting goals transparently and collaboratively are equally applicable.

Using the aforementioned chapter from *The Open Organization* as a guide, this chapter will explore the benefits of collaborative goal-setting, then outline some steps for taking transparent and collaborative action. If you're an individual contributor, then use this chapter to begin identifying actions you can take to be more trans-

parent and collaborative in your goal setting. If you're a manager of a team (or director of multiple teams), use the information presented here to develop your teams' transparent and collaborative goal setting practices by helping them understand the tangible benefits of being open.

Why set goals in the open?

The Open Organization notes that inclusive decision making "gives you a moment to look at the bigger picture and how your role fits into the overall business plan. It allows you to step back and look at the forest, not just the tree in front of you."

In today's always-on, constantly connected world, this opportunity for thinking is a gift—a luxury, really, because it affords us a moment to pause and understand how our work contributes to a greater sense of purpose beyond ourselves, our team, or our department.

With that bigger picture more firmly in our minds, we can look around and see how other individuals, teams, or departments can help us achieve our goals, or how they will be impacted by the goals we decide to set.

It builds networks

As *The Open Organization* puts it, "The more transparent you make the decision-making process, the more effectively you can turn those decisions into real action that everyone will engage in." By thinking in this way, we've just created for ourselves a massive opportunity to turn our goal setting into a networking and relationship building exercise, which benefits both us and the organization. Sharing our goals is the perfect excuse to bolster existing working relationships and reach out into the organization to create new ones. We'll not only be strengthening our corporate networks and creating potential future opportunities for ourselves, but also be increasing our understanding of others' roles and the ways they also connect to the company's vision—creating alignment for us and our team. It may even make the people we engage pause for a moment to reflect

on the bigger picture, so this gift we've given ourselves by taking a moment to reflect is now paid forward to others.

It leads to better results

When it comes to open goal setting, *The Open Organization* says that, "Opening up leads to better decisions, better engagement, better execution, and ultimately better results." We can't know everything. Acknowledging that fact is a great strength, not a weakness, because it fosters your learning mindset, opening you up to other perspectives and ideas. It's called being resourceful, and it's the first step towards being able to influence those around you to help your cause. Eric Raymond's summation of Linus' Law (in his essay and book *The Cathedral and the Bazaar*) applies equally well to software development and goal setting: "Given enough eyeballs, all bugs are shallow." Inviting others into the process enables us to find the limitations and gaps in our thinking more quickly.

It strengthens culture

By including others in our goal setting, we not only gain *their perspectives* (leading to a better outcome) but also model the behaviors of an open culture for them to experience. This modeling of behavior is important. As *The Open Organization* says, "Collaboration builds understanding, trust, and buy-in." But I believe that's not the entire story; *how we behave when we collaborate* is what really helps us achieve success and buy-in. People see *what* we are doing (collaborating) but they experience *how* we are doing it (transparently). Our behavior becomes our message.

It creates new opportunities

Transparent collaboration around setting goals has great benefits to the organization, no doubt, but it can also be the differentiator that sets us apart in the organization and opens up new opportunities for us.

We're more likely to achieve our goals when we open them up, because others understand how they can support us in achieving them. But we're *also* establishing a verifiable track record of being

able to set goals and achieve them, while also demonstrating that we are the type of person that can work with others to achieve the company's vision.

If culture eats strategy for breakfast, then execution is setting the table and cleaning up afterwards. Fortunately, taking action to set goals transparently and collaboratively can be very simple. As *The Open Organization* puts it, "The good news about inclusive decision making is that it's easy to start. You can simply ask a few others for their thoughts on a decision you are making."

Approaching transparent and collaborative goal setting

The Open Decision Framework[16] provides a useful process for setting goals transparently and collaboratively. Applying it to goal setting means identifying people that will be impacted by your goals or those who could help you make them better. Invite these people to hear you articulate your goals, and allow them to share their feedback on those goals with you. At the heart of the Open Decision Framework is constant communication: The framework guides you on what things to consider communicating, who to communicate them to, and when to communicate them.

Whatever goal setting methodology you choose (be it SMART, OKRs, or something else), approach the process as its *own project* in a transparent and collaborative way. In other words, treat *the goal setting process* as its own project, just like you would the *work toward the goals themselves*.

Start with where you are

Before stating your wild goals for the future, first build an understanding of where you are *now*. This way you'll be able to chart a clear path from *here* to your *ideal future state*—that is, once you've identified your goals.

16 https://opensource.com/open-organization/resources/open-decision-framework

First, begin building that understanding. Look around you and see what information and resources you already have at your disposal: Corporate vision and mission statements, departmental goals and objectives, team SWOT analysis, your own development plan—these are all good examples of existing internal sources of information that can help you build your understanding of your current working landscape and align with others in the business.

Next, add more depth to that landscape. Look for current topics and trends *inside* the organization. Look *externally* to your customers' focus, then examine industry trends. This can be as simple as taking note of what senior leaders in your organization are talking about, what your customers are posting on their websites, and what industry news feeds are promoting to get a greater sense of what's happening around you.

This added layer of information can help you start seeing ways you, your team, or your department could set goals that contribute to serving your customers and achieving your company's vision. This creates alignment.

Information that feeds into your understanding of the current landscape doesn't just have to come in the form of artifacts, however. Think about who you might speak with to add to the written information you have: managers, peers, direct reports, customers. In every conversation is an an opportunity to spend a couple of minutes building a greater understanding of the environment you work in.

Articulate where you want to be

Now that you've started assessing some areas in which you, your team, or your department could invest to begin solving a customer problem and align to the company's vision, you can identify more specifically *who you are serving* and *what the business need is* by creating some goals to guide that investment.

The Open Decision Framework poses some useful questions to identify stakeholders and alignment to the business. For example:

- Whose problem am I trying to solve?
- What are the people I serve looking for from me?
- What's the business need?

- Who will I need or want help from?
- Who could be impacted from my work?
- Who has set a similar goal before?
- Who is likely to disagree, dissent, reject, or opt out?
- Who else may care?

By answering these types of questions you'll be able to start articulating your goals as objectives that solve a business need for a stakeholder in alignment with the company's vision. This articulation is what you can take to stakeholders to ask for their feedback; the act of doing this underscores your transparent and collaborative engagement.

Engage with your stakeholders

Now you have an understanding of where you are and you can articulate your goals to your stakeholders. Great! Now it's time to meet with them and gather their feedback and input.

You could use your own venues for this. Remember that as a manager of a team or a director of multiple teams, *The Open Organization* says, "you have the power to create venues for bringing people together, and you have the power to set the agenda."

In that meeting, share your problem statement, goals, and intended approach to help your stakeholders understand your thinking behind the goal setting process. Then leverage this opportunity to gather rich feedback by going beyond the generic, "Any questions?" and asking specific questions to elicit more useful feedback:

- Where do you disagree with our definition of the problem statement?
- From your experience, what gaps do you see in our approach?
- Given how you see our team's strengths, where could we be bolder in our action?
- Who else do you think could help us improve our goals?

Getting started with this could be as simple as inviting your stakeholders to one of your regularly scheduled meetings. Or your could get more creative: host a panel discussion, give a series of

lightning talks, or establish some other platform altogether. The point is that it doesn't have to be difficult and it doesn't have to be boring—just keep your focus on the end game, share your goals, and get some feedback.

If you can't get the people to come to you, then go to where the people are. Use existing venues such as asking for a few minutes to present your goals in another team's meeting. Look to the virtual world; *The Open Organization* reminds us that, "By using technology as an ally, you can reach out to far more people in the organization than can fit in a meeting room." Look for existing communications vehicles that you could hitch your wagon to, such as newsletters, intranet landing pages, or local and regional office communications.

Of course, whatever means you use to engage with your stakeholders, as *The Open Organization* tells us, "When you do, be open, honest, and frank." Acknowledging that you don't have all the information is a great way to allow others to step in and help fill the gaps.

Remain transparent

Transparent and collaborative goal setting is not a one time activity. Just as glass needs regular cleaning to avoid becoming opaque, your goals and collaboration with stakeholders need regular review. Keeping stakeholders informed about progress in achieving your goals is as important as informing them about the goal setting process in the first place. Your biggest obstacle to achieving this is your willingness to create the time and space for it to happen. There are two ways to get around this problem, and you can use them both:

1. **Go guerrilla.** As circumstances change with the passage of time and people move in, out, and around the organization use these moments as opportunities to reconnect with your stakeholders to update them on progress, celebrate successes, and solicit feedback.
2. **Get programmatic.** Dedicate a segment of your regular All-hands meeting to reconnect your team and stakeholders to your goals, progress, and remind them how their roles connect to the company's vision.

Meetings and events are ephemeral, so make sure you generate artifacts from them that others can consume asynchronously. Slide decks, video recordings, podcasts, and blogs are all good examples of content you can extract from a meeting and make available for others to consume when they have the time. Creating and promoting these artifacts are the perfect tasks for anyone in your team looking to develop their communication skills.

Ongoing communication is the key to being an open organization. By communicating regularly you are establishing a habit that builds an open culture: "Setting goals transparently and collaboratively? Oh that's just how we do it here."

Michael Doyle supports growth in others through executive coaching and leadership development—inspiring them to turn knowledge into action one step at a time by openly sharing his development journey.

Visualizing your plans and progress

Jimmy Sjölund

In many organizations, strategic planning is the responsibility of only a few individuals. A management team might meet in a secluded offsite location, develop a corporate strategy or a set of team goals, then reveal them to the rest of the company. Sometimes they distribute a presentation afterward. They might issue updates throughout the year, but those updates come from the same small team that put the strategy together in the first place (and only if results meet objectives). The rest of the staff might get an update from time to time, especially if they're below the budget target and need to improve before the next quarter (budget targets they have no idea how to translate to their daily work). More likely, the plan winds up on the company intranet, where it languishes, never to been seen again until next year—when it's replaced with the new strategy or goals for the upcoming year. In some cases, they might reference it when they're presenting their new plan.

Is this just a dystopian picture I'm painting? Or have you actually worked in one of these companies?

Strategic planning of any type is more effective when it's *open*—that is, when leaders open their planning processes to feedback, and when progress toward the plan is transparent and clearly evident. To make this work, open leaders can *visualize* the plans to make them accessible to all organizational stakeholders.

But why make plans open in the first place? What are the benefits?

In short, Linus' Law applies to strategies as well as code: "Given enough eyeballs, all bugs are shallow."[17]

17 See Raymond, E., *The Cathedral and the Bazaar.*

Everyone benefits from an open approach to planning. If everyone knows the direction we're headed and why, we can all continuously evaluate *together* whether what we're doing is contributing toward this goal or whether we should stop what we're currently doing because we realize it's not helping us on our path. The other great benefit is that the strategy remains open to further improvement through feedback from everyone in the company.

Over the years, I've picked up some methods for doing this simply and easily. And in this chapter, I'll share them with you.

Spotify Rhythm

When it comes to visualizing work and working in agile ways, many turn to Spotify. When you begin examining Spotify, you soon end up watching a video of (or one made by) Henrik Kniberg.[18] One of these videos cover what's called the Spotify Rhythm.[19]

The Spotify Rhythm visualizes strategy as a series of concentric circles. In the center there are the "company beliefs," produced by the CEO, which typically span across the next three to five years. The next circle in their picture represents "north star" and "two-year goals." The CEO and top management put these goals together. From those, then, Spotify makes "company bets," which are more hands-on projects or cross-organization initiatives. While using this method, "bet boards" spread to other departments, who set up their own boards or even tribe/team boards.

The company board gets updated and synced regularly by a strategy team, which sets the focus for the coming quarter. The "lower level" boards, then, update at a faster pace (usually every six weeks), and the level below *those* update perhaps every second week (or in two week sprints).

Spotify also uses tempo markers to indicate whether everything is running smoothly, work is moving a bit slower than expected, or something has halted or crashed completely. What the

18 https://agilasverige.solidtango.com/vimeo/spotify-rhythm-hur-vi-skapar-fokus

19 https://blog.crisp.se/2016/06/08/henrikkniberg/spotify-rhythm

company learned from this was to not work on too many things at the same time, as that usually made things go slower or grind to a halt.

This method's openness helps teams see the direction the entire company is heading and align their own goals and work to follow that path. It helps teams make their own decisions about what to work on and where to go; they're still responsible for determining how to make best use of their time. That, in turn, will also add to their autonomy and motivation. It builds the community: We all know where we're going, why, and how we're doing along the way.

The Spotify Rhythm also makes visualization simple. It requires only a spreadsheet (as the company was updating continuously, it made most sense to use a simpler tool). Sometimes it's as easy as that. Whatever tool you choose, you'll need to make it accessible, of course, and communicate where to find it. But ultimately whether you do this through a something like a spreadsheet, an intranet site, or a special tool doesn't matter. What matters is that it is *out in the open and people can find it*.

A3 reports

A3 reports are the result of a work method or a problem solving approach, one that emerged from Toyota and the Toyota Production System, which one could say ignited the worldwide "lean" movement. Toyota uses A3 reports for many purposes—from status reports, to proposal and policy changes, to (most notably) problem solving. The name for this method derives from the paper size it once required: the largest possible size you could still fit into a fax machine (today, as less is more, Toyota also promotes A4 reports!).

The A3 report should contain all necessary information for handling a specific problem or making a particular decision. The format differ depending on whether it's an A3 for problem solving, a proposal, a status report, or for strategic planning, but in general it includes:

- A short description of the issue or background
- A status report of the current situation

- A description of future state or goals/targets
- An analysis of or a statement on the root cause (in case of problem solving)
- Suggestions for alternative improvements or solutions
- A recommended action, next steps or a time plan
- An analysis of the cost and value (if applicable)
- Follow up

The A3 process is based on the Deming Cycle: *Plan, Do, Study, Act*. One of the advantages with an A3 report is that it makes plans visible and easier to read quickly, but one must remember it's also only one step in the decision-making process. Another piece is the *nemawashi* process, where the principle is to do decision-making slowly and in consensus. Many people will circulate and discuss an A3 report before it's presented to decision makers or management. Feedback it receives along the way helps to perfect the report so that when it's time to make a decision the information is clear and to the point. This potentially makes decisions take longer—but when everyone is on board, implementations are much faster.

It's imperative to stress again: *the A3 is not the tool*. The A3 is the result of the iterative process of analyzing the situation; it's the visualization method. In Toyota Kata, it's used in the dialogue between the mentor and the adept. The important thing is *how* and *why* an A3 is developed and used, not the format or the report itself.

A strategy-focused A3 is by nature future-oriented. It gathers the future goals and needs, and will cascade down through the organization to people's daily work. The visualization is important and easily communicated by this one-page condensed message. In the *nemawashi* process, many have already had the opportunity to give feedback and through the visualization of the A3 everyone can quickly be reminded of the strategy and how their work is aligned with the goals and achievements.

Servant Manager Door

In his book Toolbox for the Agile Coach: Visualization Examples Jimmy Janlén describes a method known as "Servant Manager

Door."[20] The basic gist of this method is that a manager or leadership will have a small (kanbanesque) board displayed, usually on their door or in a common space. The board is to show what focus that manager has on impediments that need their support outside of the teams or department. It's an easy way to show what you're currently focusing on—and being transparent about what you are currently not focusing on. A simple board with three columns is more than enough; the board only needs to include what's next, what's currently be worked on, and what has been done. And leaders can easily set this up in a simple, digital way if teams are spread across different locations.

What this method provides is constant feedback to teams that the leaders are involved. The transparency make sure everyone know the status of different improvements, which in turn helps to build trust within the organization.

Open, always

Planning and working in the open always has advantages:

- People and groups that come together with a shared purpose are extremely powerful. With clear priorities communicated everywhere and shared with everyone, you'll get a much better understanding of how your work contributes to the organizational big picture. This improves your autonomy as you can steer your own actions toward the common goal.
- Transparency helps facilitate feedback loops. Being able to make decisions closer to the source is beneficial, of course, but transparency can also improve collaboration and feelings of community. You never know what inspiring or useful feedback you might receive from unexpected sources.
- Visualizing work can make the imaginary wall between management and workers disappear, and they can en-

20 https://visualizationexamples.com/

courage everyone to feel more engaged in their everyday work.

Whether you select a team kanban board, a Servant Manager Door, or the company bets, if your methods are transparent and open for comment, you'll grow as a community and as an organization. You might even make some more money by focusing on the right thing to do.

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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. 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[21], 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.

21 See Jimmy Sjölund's chapter in this volume.

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

A brief example: Dollar Shave Club

Dollar Shave Club's hypothesis was that men don't need fancy razors with lots of fancy features, nor do they want to spend time shopping for them. Their experiment involved creating a one-minute video[22] 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.[23]

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

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

Planning for the future isn't what it used to be

Sam Knuth

In May 2017, Red Hat CEO Jim Whitehurst drew a stark conclusion in his keynote presentation at the annual Red Hat Summit event in San Francisco:[24] "Planning as we know it is dead." He said those same words again during a Red Hat planning session in October of 2018, when a cross-functional group of Red Hat leaders assembled to assess the current state of the business and discuss the roadmap for the coming year.

The technology landscape and business environment are changing so quickly, Jim argued, that trying to conduct planning activities in any kind of traditional way just isn't possible anymore. For some, this is a radical idea—and a deeply uncomfortable one. For others, the idea that we can't do traditional, long-term planning is obvious. The question (and much confusion) arises when we start thinking about *what we will do* when long term planning is no longer possible.

While we can no longer plan in the traditional, comforting way of specifying a fixed roadmap and making steady, foreseeable progress towards it, we can still have a strategy with goals that help us achieve it. The big difference in approach is understanding that *the plan will evolve as we go* and we need to make real-time adjustments based on results. That means doing things in smaller chunks, getting feedback from customers and stakeholders, and modifying our approach accordingly.

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24 https://youtu.be/8MCbJmZQM9c

In this spirit, Jim suggested that we replace long-term planning with a more experimental approach, one common in open source software development: "Try, learn, modify."[25] I believe in this approach and use it frequently in my work, but it's not without its challenges. Misconceptions about it can steer people in wrong directions. In this chapter, I'll walk through some of those misconceptions and offer some ways we might think differently about iterative approaches to achieving goals in an era when planning is dead.

1. "Agile" isn't a catch-all

The term "agile" originated with a specific meaning related to flexible but disciplined software development. Over time, other industries and professional domains have discovered the benefits of rapid iteration, radical customer-centricity, continual feedback, and cross-team collaboration.

But I've seen "agile" become a kind of catch-all phrase people use without much reflection. I'm not an agile expert (and I don't pretend to be), so when I hear people using "agile" outside of its original context, I like to ask clarifying questions about intent.[26] In other words, *What does being "agile" mean for your work and what are the benefits?* This might mean asking:

- How does your team prioritize its work?
- How often does your team share, or "release", its work to get feedback?
- How does your team process the feedback, balance contradictory feedback, or weigh feedback from different stakeholders?
- How easy is it for your team to adjust course based on feedback?
- What indicators does your team look at to understand if it's moving in the right direction?

25 https://opensource.com/open-organization/18/3/try-learn-modify

26 http://agilemanifesto.org/

Asking questions like these can help focus the discussion and clear up the assumptions and confusion that terms like "agile" can create. They prompt people to clarify *what* (if anything) about their processes is actually *agile*. I try to make it a regular practice to dig in deeper when people cite "being agile" as a reason for not planning or prioritizing.

2. "Planning is dead" doesn't mean "we don't have goals"

Instead of saying "we're agile" as a proxy for "we don't have a roadmap, or a plan, or even a vision," I like to talk about flexibility and the need to iterate on our approach as we move toward a long term goal.

For example, currently my team at Red Hat (which creates the product documentation for all Red Hat products) has a long-term plan of making our content more flexible and customer-goal oriented —of moving away from the traditional "product reference book format" that we've used previously. This change is a huge shift in how we conceive of, plan, and execute our work, and we've taken this long-term focus as a result of customer feedback. In making the change, we need to balance the demands of short product release cycles, continual streams of incoming feedback, and limited resources. Making an important change in how we approach our work is like changing a car's tire while we're still driving it.

So we need to be creative, try different approaches, and shift gears quickly based on real time results and experiences. We can't set the daily demands of new content creation aside to focus on the reformulation of the existing content, but we also can't move forward without making progress towards the change. That'd be like driving a car with a flat tire indefinitely.

The best way to move forward is to focus on small chunks. In the case of my team, if one product has five reference manuals done in the "old style," we may continue to maintain four of them *status quo*, making just incremental changes—and completely rewrite one of them in the new, modular style during a product release cycle. We put that content out there, get feedback from stakeholders and cus-

tomers, and then adjust our approach as we tackle *another* small chunk in the next release cycle.

Under the old "Waterfall" model, we may have taken *years* to work on changes across all content, pausing other work, and then releasing the new content all at once to customers. But product release cycles aren't done over the course of years any more; they happen over the course of months. While keeping up with that pace of can be challenging, the new cadence also gives us the continual ability to get feedback as we work—so we know if we're on the right track and we can make adjustments quickly if needed.

As you look at your work, there are some questions you can ask yourself, your peers, or your leadership to better understand the long term plan if it feels like the work is haphazard:

- Do you know what the long term vision is for your team? What do you hope your customer experience looks like in three years? In 12 months?
- Do you understand how the long-term vision for your team connects to the goals of the company as a whole?
- Do you have short term goals? In other words, for the work that you are doing right now, do you understand what you (or your leadership) are hoping to achieve with it? And how does that short term goal contribute toward that longer term vision?

Questions like these can help you understand, or tease out, the purpose behind the work you are doing. They can also help the team avoid the pitfalls of using "agile" is an explanation rather than as a method (e.g., "we're doing it this way because we're agile" versus "we're using this agile method to achieve our goal").

3. "Constant change" doesn't mean "total chaos"

At the heart of "try, learn, modify" is a state of constant change.[27] We all know change is hard. We experience it personally and we see it every day in our work and lives. This basic human

27 https://opensource.com/open-organization/18/10/open-leader-creativity-guide

truth substantially complicates the reality we face: having to continuously adjust our work to suit the changing environment.

Even people who embrace "agile" can have hard a time with change. We have a reflex to resist it, question it, avoid it, and fear it. It makes us uncomfortable and insecure. Even people who purport to love and embrace change can have a hard time with it.

I'm one of those people. As a leader of a team, I see the need for change. But as a member of a team of leadership peers, I know I'm uncomfortable when it's "inflicted" on me.

What I try to tell my team is that we can make change easier by understanding that it is inevitable (indeed, it is part of the plan), by anticipating it, and by being excited about the possibilities rather than being afraid of the unknown. One question I've been asking myself recently is this: Has there ever been a year in my professional career (or my life for that matter) where I could successfully predict what would happen during the course of the year? The answer is a resounding "no"; something unexpected *always* happens. Change is routine.

Many people have (or have developed) a comfort with change that is truly remarkable to observe: a calm openness to trying out different approaches, an unthreatened willingness to explore possibilities, a desire to talk about how we might be more effective if we did things differently. So my advice for improving how we deal with change is to observe how we react to it:

- Do you feel like somebody else is being "political"?
- Do have the urge to protect "your territory"?
- Do you find yourself explaining why we need to keep doing things a certain way?
- Do you ask yourself why "upper management" is making so many bad decisions or sending mixed signals?

In my experience, all of these are signs of discomfort with change. Left unchecked, they can sew distrust of others' motivations. If you feel any of these things, explore those feelings and discuss them with your leadership and your team.

Being open about discomfort is a great way to move past it. And if we can get past the discomfort, it can be a lot of fun.

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Part 2:
Organizational Design & Culture Building

When open values drive open behaviors: Defining open leadership

DeLisa Alexander

Leadership looks different at Red Hat. People don't just *receive* the status of "leader" when appointed to a position or given a title. Instead, we've observed through the years that at Red Hat leaders *earn* their leadership positions when they adopt a special combination of mindsets and behaviors.

A few years ago, we embarked on a journey to identify that unique mix of mindsets and behaviors. And we used what we discovered to shape how we help people become effective in leading in our open organization. We strive to develop leaders at all levels, enabling them to extend their impact and strengthen the open culture that has been so critical to our success.

We found that open leaders leverage a set of mindsets and behaviors *to create an inclusive meritocracy, where everyone can thrive by contributing at their best*. Open leaders create a community with shared purpose, where everyone harnesses their individual strengths and talents to unlock their full potential.

After 17 years of working in our open organization, I've learned a lot about what it means to be an open leader—often by making mistakes along the way. As our CEO Jim Whitehurst sometimes says, when you operate at the bleeding edge, sometimes you get cut. These are a few of my stories, some of the lessons I've learned reflecting on what we've learned at Red Hat about the stages of open leadership. Ultimately, our journey has helped us establish a community of leaders who use open leadership to unlock the potential of both Red Hatters and our customers.

Our open leadership roots

To understand why open leadership is such a big part of our story, we have to look back to our founders, Marc Ewing and Bob Young.

Marc was a software engineer with a big tech company, and he became a true believer in the open source development model after being frustrated with the proprietary development model. Marc realized that he could work with his own small team to develop software, and they would make incremental progress and incremental innovations—or he could share his code with a broader developer community, inviting those best suited to solve problems to participate and to innovate much more quickly. He chose the second option. That's how Red Hat's first Linux distribution was born.

Bob was Red Hat's first sales and marketing leader, and he saw the potential in the open source way. We still had a long way to go to develop a sustainable business model, let alone reach profitability. At the time, Bob was also selling T-shirts, magazines, and coffee mugs to boost the bottom line. But the underlying interest in the development model, the passionate community of developers committed to keeping the code open, and the early hires Marc and Bob made from this community cemented the open source way as the way that Red Hat would develop technology.

Those early hires, and the community that sprung up around Red Hat Linux, were committed to a level of transparency that gave all participants the same amount of insight. They chose meritocracy over hierarchy to ensure the best idea wins. They viewed collaboration as essential to success. And they took a "release early, release often" approach to development. As Red Hat continued to hire more people from the open source community, these expectations and norms became those of our Red Hatters.

At Red Hat, those principles of open source software development shape our approach to leadership. We found that the people we hired from the open source community expected leaders at Red Hat to act like community managers. Their expectations for managers were very different from what you might find in a traditional, hierar-

chical company. They expected meritocracy—that anyone could bring great ideas forward, and that best solutions could come from anyone, anywhere. Anyone could chose to lead.

At Red Hat, we believe open leadership is *a set of behaviors*, not strictly a *position* in an organizational chart. Driving those behaviors is an open mindset—a preference for working and acting with open values and principles in mind (see Figure 1).

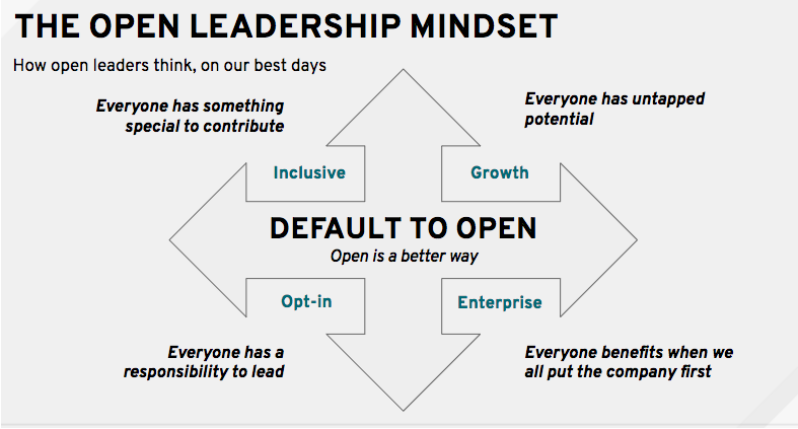

Figure 1: The Open Leadership Mindset

Of course, a person's behaviors and that person's position in the organization do reinforce one another. But in an open organization, and especially in an inclusive meritocracy, a person's role in the organization doesn't *guarantee* influence; it just *amplifies* the influence that person has worked to generate. Executive leaders do benefit from greater visibility in an organization, for sure, but in many ways that means they shoulder a larger burden to continually demonstrate (through their behaviors) their commitment to the organization and its values. Excellent leaders accrue more influence when they use their highly visible positions to elevate the organization and its mission. Poor leaders lose influence when others see them behave in ways that might seem counter to that mission. The more influence a person has accrued in an open organization, the more visible their position in that organization will become—and the

more responsibility they bear for doing right by the organization as a result. We've collected and codified some of this knowledge in our Red Hat Multiplier, a tool we use to identify and assess leadership behaviors at Red Hat (see Figure 2).

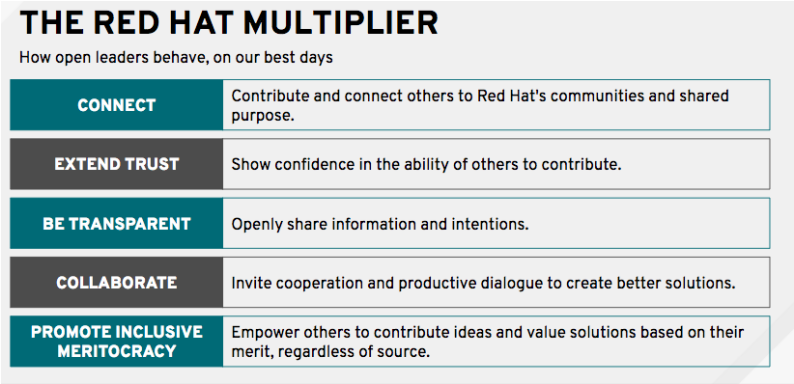

Figure 2: The Red Hat Multiplier

This open approach to leadership is key to how we grow and scale our culture. We've learned a lot of lessons along the way as we have matured. Back in those early days, we had no manual on open leadership that we could refer to (which is why I'm so happy this project exists). As we've worked to understand the nature of open leadership, we've observed three important stages of its development:

1. Leading personally
2. Leading through a team, and then
3. Leading exponentially by catalyzing other leader

Let me explain them.

Stages of open leadership

Personal leadership

Leadership begins with every individual. Becoming a leader is a personal choice people make when they want to contribute beyond their own self-interest. Leaders enrich an organization's culture when they become an influential voice on a particular topic, and

when their actions effectively influence and engage others. Personal leadership can be an incredibly powerful force.

I began to learn how to lead in an open organization when I joined Red Hat as the second lawyer on a team of two. Within the first week, I was working on several questions our legal "department" received about how certain open source licenses should be interpreted and applied. I studied the issue and provided my learned opinion.

Then something happened that would never happen at a law firm: The developers with whom I was working (my clients) promptly informed me that they disagreed with my opinion. They suggested using a different license.

I was simply shocked that they would debate my advice. I was the lawyer, after all. In a law firm, if I were working as the senior lawyer on a project, others would have deferred to me even if I were wrong. After practicing law in an outside firm and moving up the law firm ladder, my hourly billing rate meant that people listened to me. I thought things would be the same at Red Hat, with my credentials speaking for themselves. Once inside Red Hat, however, I soon discovered that's not how open leadership works.

After I listened to the developers' reasoning, I realized they were right. They, in fact, knew the open source licenses better than I did. That's when I began to understand that I had to lead by being transparent about my findings and analysis. I couldn't simply opine on a topic. Open leaders don't rely on *compliance*, but on *influence*. Open leaders are defined by those who choose to follow.

As a leader in an open organization, I needed to be prepared to defend my logic. I needed to know the ins and outs, the pros and cons, the ideal and the realistic aspects of every issue I debated. Over time, I developed my ability to lay out a common fact base, to describe mitigating factors, and to make the business case for decisions even if they weren't ideal. When I engaged my peers transparently and early in the process, we often identified even more risks or mitigating factors. We were forging new territory in copyright law, and we were able to approach problems in a new, more

productive way. By adopting this approach, we felt confident that we made the best decisions for Red Hat. Working collaboratively and inclusively—such that job titles and business cards were less important—I was able to provide much more value to the company.

In short, I learned what personal leadership was all about.

Team leadership

When an individual needs to lead a team of people, directly or indirectly, that leader must 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, and with project and program managers, members of organized groups and communities can also exercise team leadership by aligning the strengths and interests of their stakeholders and collaborators.

Before I was selected to lead our human resources team, I was the primary legal partner to my predecessor. I had provided legal advice to her team and been a customer of their programs. By working with her on some critical projects, I had developed deep expertise in executive and equity compensation (very important capabilities for the HR VP), but I had limited exposure to other critical talent capabilities. So when I stepped in to manage the People team, I needed to learn a great deal more about all of the other areas including employee relations, talent acquisition, benefits administration, training and development, performance and development, and talent management. This was a daunting challenge. The people who populated my small team were all subject matter experts deeply knowledgeable in their areas, and often they were the only person at Red Hat responsible for it.

Importantly, I did have a deep knowledge of and experience in Red Hat's culture and grounding in our open leadership concepts. My perspective coming into this management position was that there were many opportunities to provide even more value to Red Hat if we grew into being business partners in addition to HR policy protectors.

HR policy protectors are often in the position of trying to prevent their internal clients from doing the wrong thing. This is clearly an important function, and HR organizations tend to approach policy adherence from a command and control position. This is what the team was hired and chartered to do at the time. But if we could shift our mindsets and move to being *business partners* with our internal customers, we could provide more value *and* help solve business problems.

At the time, our sales general managers said that our biggest business risk was an inability to grow by attracting the best new talent. I wanted our team to be in the room to ask probing questions and to collaborate by providing data and insights, so that our partners could make better talent decisions. This required a total shift in mindset and growing our capabilities, but it was what our People team needed to do to provide more value, and more importantly, to put us in a better position to grow and scale our open organization.

I will be blunt. Stepping into this new role was one of the hardest things I've ever done. I was taking on a new position where I was managing people who were once my peers. They had the specialized HR knowledge that I needed to learn, and I was asking them to make a major strategic shift. Just as in my previous role, I had to make the case for why we needed to move in a new direction. And I had to up my game, doing deep dives on our core functions so that I could be fully conversant in the areas where our team worked. I had to navigate moments to push for change when I thought there was a more effective way to provide business value, and moments to let their knowledge and expertise carry the day. Sometimes we had to "let the sparks fly." I made mistakes, but I worked hard to set context for our work by articulating a clear vision of better business partnership that would allow Red Hat to accelerate while maintaining solid policy practices.

Gradually, the team began to support the vision of helping Red Hat achieve our business objectives. Our subject matter experts began to leverage their expertise and grow their capabilities as business partners, and I stepped out of the way, empowering them to

determine how to accomplish the specific tasks needed to reach our goals.

If I could time travel and talk to myself on my first day as the People team's leader, I would tell myself not to expect buy-in from everyone immediately. While people have their own perspectives and experiences, you can do many things to accelerate the support for your vision. Open leaders need to have the mindset that their role is about inspiring people by understanding their values and goals, how they connect their work to your organization's purpose, and your organization's higher-level goals. Successful open team leaders extend trust and bring their people's expertise to the table, get their perspectives, make adjustments, and then let the experts decide how to best contribute to a shared vision.

Exponential leadership

Exponential leadership occurs when an individual's impact gets multiplied. Exponential leaders compound and integrate the strengths of teams (groups of people) to create new organizational capabilities. They create new leaders and catalyze vibrant ecosystems of teams that channel their passion and energy toward a shared organizational purpose to deliver rapid results. Their leadership contributions have a powerful effect, with the potential to profoundly influence an organization's culture.

Fast forward 17 years after I joined Red Hat. We'd been experiencing exponential growth in our business, and we'd hired many, many new Red Hatters. Those were great achievements, but by now our founders had been gone for a long time. We often assumed that all Red Hatters could state Red Hat's purpose and would use that purpose as a north star for making decisions, but I'd started seeing some indications that was not the case. Some Red Hatters saw their purpose as contributing to open source communities; others saw it as driving business results, or delivering value for stockholders.

At that point, I was lucky to have the chance to meet Simon Sinek, author of *Start With Why*. After learning more about his work, it was interesting to realize that while we have a mission, vision, and values, we did not have a purpose statement. I felt that we needed

an aligned way of articulating our purpose to reduce inconsistencies and risks to our culture for the future.

Simon and the consultants we engaged suggested working with our senior management team and executives to develop our why, then doing change management for our associates. But we were not trying to change anything. What we needed was an open organization approach, a companywide conversation where we engaged all associates as collaborators.

We began by inviting all Red Hatters—more than 10,000 people—to share their personal why stories by describing a moment when they felt especially proud to work at Red Hat. More than one out of every five did! These were some of the most incredible, inspiring stories I've ever read. Some Red Hatters even posted their stories to our company-wide mailing list and intranet, for all to read.

We were overwhelmed with so many stories; in fact, we simply didn't know how we were going to pull the data out of the stories. We had some ideas and were transparent with the entire organization about the fact that we were going to take the time to build some technology to help, but stressed that people should anticipate this would take us a while. We ultimately created an analytics tool for identifying key narrative themes using open source natural language processing technology. Pairing this tool with human intelligence allowed us to identify key themes, shared beliefs, and cultural concepts.

As we moved through the project, again and again we enlisted Red Hatters to push us along. When we shared a few gaps in our data collection and surveys, a number of our people helped us reach associates who were underrepresented. And when we asked for input on our rollout plans, in addition to sharing creative ideas, many Red Hatters took up the baton and blogged, tweeted, or spoke about our why statement of their own accord.

To make the "Rediscovering Red Hat's Why" project happen, I had to practice my best exponential leadership skills and get out of the way. We brought together a community of incredibly brilliant Red Hatters, and my role was to resource and transparently provide

context for their work.[28] Some of these associates were people you would expect to find in a room leading up such an ambitious project. Others were stretched by the experience and emerged as new leaders who have gone on to excel in our organization.

For me, this project reinforced the notion that when you give Red Hatters the ability to create something brilliant they will wildly exceed your expectations. To help them succeed, you have to create the right environment to multiply their individual strengths and talents. The process may sometimes be messy, or chaotic, but you have to have faith in the power of participation. Our project team thought through the details, developed intricate project plans to engage all Red Hatters, conducted data gathering, and analyzed the results. I influenced their work more as a collaborator, not as a hierarchical senior manager.

In a brainstorming session with Red Hatters from many different levels and departments, Chief Technology Officer Chris Wright suggested the phrase we ultimately adopted as our Why statement. When he made his suggestion, heads began to nod, we knew intuitively he had articulated the central theme that many Red Hatters had expressed as our purpose: "Open Unlocks the World's Potential."

What's next

At Red Hat, we strive to be open by default in our collaboration with associates, communities, customers, partners, and other stakeholders. We believe that open unlocks the world's potential.

Bringing this to life requires open leadership at all levels. Open leaders are especially adept at applying open principles to their work, inspiring, guiding, and assisting others. In fact, they prefer this manner of working and leading to any other. They are transparent about both their goals and constraints, sharing data and resources as widely and thoroughly as possible. They create inclusive environments by drawing diverse and disparate groups of stakeholders into productive conversations and establishing the con-

28 See Jim Whitehurst's chapter in this volume.

ditions for pointed yet respectful dialogue. Rather than simply issue commands, they take great care to provide teammates with both sufficient context for the challenges they face and the latitude to make innovative decisions. And they constantly seek the best ways to align their teams' actions and behaviors with an organization's mission and goals.

Looking back, I can see how my own leadership journey has impacted how I view the concept of open leadership. Open mindsets and behaviors help open leaders succeed during the phases of their leadership journey. Individuals exercising personal leadership must engage transparently and rely on influence to lead others. Team leaders have to set the context for others, connecting their work to the organization's goals and creating an environment that aligns strengths and embraces inclusive meritocracy. Exponential leaders catalyze not just one team, but many teams in an open, collaborative environment, and they work to ensure new leaders emerge to address the challenges an organization will confront in the future.

Now, we are seeing the need to articulate the manager's unique role in an open organization. Our next frontier to explore is the concept of *open management*. We think we know open management when we see it at Red Hat. Open managers are leaders given resources and accountability to create value through and with other people. They know that the best way to do this is to help people lead in order to unlock potential. Now, we need to deepen our understanding of the role of open managers, measure their impact, and put systems in place to help open managers and the people they manage thrive. We will look at what great management looks like elsewhere and what it looks like at Red Hat. Managers create context and connection, and they are important guardians of our unique culture. We know that the mindsets and behaviors that set our open managers apart are going to be incredibly important at this stage of our growth.

With the values and leadership principles firmly rooted in the world of open source, we have a strong foundation to build upon.

DeLisa Alexander is Executive Vice President and Chief People Officer at Red Hat.

Stop hiring for culture fit

Jen Kelchner

Talent leaders should hire for "culture fit"—at least, that's what we've heard.

Today, however, conventional wisdom is coming under scrutiny. And in light of today's accelerated pace of innovation, I would argue that hiring for culture fit is no longer advisable—nor is it a method for achieving sustainable growth. It's just not the best way to grow or sustain engagement and productivity in teams or organizations.

If you're hiring for culture fit, you're doing it wrong. To build, scale, and sustain your workforce to meet the demands of Industry 4.0, you'll need to take four crucial actions when seeking external talent or building internal teams. In this chapter, I'll explore them.

1. Align talent to these four cultural identities (or environments)

"Culture" is a broad term, and it can mean many different things to different people. Some groups will define it as something like "a core set of values and practices." Others view it more like "their style" (think nap rooms and beer on tap in the break room).

But, what does the term "culture" truly encompass?

According to the Business Dictionary, "organizational culture" is "the values and behaviors that contribute to the unique social and psychological environment of an organization."[29] It's the ethos, values, and frameworks for *how* a company conducts itself internally and externally. In other words, an organization's culture includes its

29 http://www.businessdictionary.com/definition/organizational-culture.html

core values, its expectations for behavior, its decision making frameworks, how it conducts itself with others, how its information flow operates, its power structures—even how one is allowed to express oneself within the organization. This cultural identity is crucial, as it affects productivity, performance, employee engagement, and customer relations.

When thinking about culture, we should be thinking about *alignment* rather than *fit*.

"Fit" implies that your organization seeks to indoctrinate new members into its specific way of life—to clone its vision of the ideal member in everyone who joins it. When we talk about "fit" we create the potential for exclusion. It prompts us to seek someone who *already* embodies the values and principles we think are best (then seek to "fit" them into a pre-existing spot in our organizations), and ignore others.

Achieving "alignment," however, is different. Alignment involves embracing diversity of thought and building inclusive, innovative, community-driven teams that are *all oriented toward shared goals, even if they look and think differently from one another.*

The necessity of thinking about "alignment" rather than "culture fit" becomes even more apparent when we examine the complexity of organizational culture. Every organization has four separate cultures (yes, you read that correctly!). Aligning talent "with culture" means aligning it with: your main culture, the subculture of the department, the team culture, and your geographic culture. Visualize the engine that runs your organization. You'll see gears that move you along. Then visualize small gears for your people, team, departments, verticals, and your main organization. Each of these gears contributes to the next in order to meet goals and propel the business forward. When we have well-oiled machines (that is, when everyone is doing something better together), we are able to propel our mission and realize our organizational vision.

Let me explain them in more detail.

The main culture

This is your overarching company ethos, your "way of doing things." It's the primary "gear" that's moving you externally in the market. It's what others recognize as "you" and, ultimately, is why clients come to you. It is the "who you are" part of your culture. When seeking alignment, look for:

- General characteristics and behaviors that agree with who you are
- Brand fit and representation that aligns
- Passion or purpose that flows into organizational mission

The subculture

Verticals or departments bring their own values to the organization's cultural mix. Operationally, each behaves differently and pursues different goals, all of which feed into the main culture. For example, engineers building solutions think in very different ways than marketing creatives do. The goals of solution builders are very different than those of creatives. Be aware of the mix. While remaining open and inclusive in your hiring practices, don't overlook the dynamics of a subculture. In this relationship look for:

- Ability to cross-collaborate
- Open communication practices
- Big-picture thinking
- General energy and personality fit
- Thinking styles

The team culture

The greatest alignment you seek is right here. Team culture determines the team's manner of working together, day-to-day, to solve problems. Team culture drives efficiency, productivity, innovation, engagement, and results. This is what allows you to build, scale, and sustain. When thinking about alignment, look for:

- How a person responds to new information and then contributes to the process—*you'll want a well bal-*

anced team to drive all aspects of change, not just natural innovators

- Communication styles
- Personality styles
- Behaviors and thought practices
- Alignment to open values
- Individual "magic" (see below) and potential for (and desire for) for growth

The geographic culture

Think of geographic culture not as an engine gear *itself*, but rather the "grease" that aids in frictionless movement. This cultural filter might not *directly* contribute to meeting goals of an organization, department or team. It does, however, contribute to reducing conflict, eliminating misunderstanding, and communication delays. You'll be looking to align with local geographical norms and global views. Considering this angle of potential alignment, look for:

- An understanding of the geographical culture
- A willingness to learn and integrate geographical norms
- An awareness and intelligence of the practices, norms or variances from one's own

2. Look for the magic

If you're seeking people to just "fill a job," then you're doing it wrong.

If you think about the people you bring into your organization as *partners* instead of *employees*, you'll have a better rate of return on your relationships. This mindset of employing partners, co-creators, and collaborators to solve problems for your clients provides a more inclusive, open approach. We use technology to "do things." But when you take the time to find the magic within *people*, they will not only be engaged and perform better, but also build careers alongside you.

When assessing specific competencies, be sure to:

- Push beyond a resume, CV, or formal degree

- Look beyond what someone has been "paid to do" (life experience and volunteer roles actually yield amazing competencies in people)
- Look beyond a role or title someone has held previously
- Look for people who are not happy staying in their lanes (the potential lies in someone who seeks opportunities for growth and challenges to stretch themselves)

Remember, of course, that the demands of Industry 4.0 will require:

- Ability and capacity to engage with fast cycles of change
- Interpersonal skills like communication, collaboration and emotional intelligence
- Leadership skills for running projects, teams and organizations
- Open behaviors and values
- Capacity to navigate open process and decision making models

And when interviewing for talent that aligns with your organizational culture, consider asking:

- What are you passionate about?
- Where or how do you want to get involved from a technical perspective?
- What do you want to learn?
- What is one challenge you would like to overcome?
- What perspective on teaming do you have?
- How do you see yourself as a leader?

3. Be open in your sourcing

Becoming a dynamic, inclusive organization requires an organizational culture built on *open* values. Only true diversity of thought can produce innovations at the level required to thrive today.

We've been working to break down barriers to diversity in the workplace for decades, and we still have a tremendous way to go in

our effort to close gaps. "Diversity" goes beyond religion, gender orientation, ethnicity, and so on. We must stop focusing on the labels society has assigned others so we "know where they fit." That is a fear-based model of control.

Building our teams based on "fit" can actually create exclusive tribalism rather than what we actually intend: a sense of belonging. For example, employing hiring practices that seek talent from one primary background or educational institution will end up with exclusive environments that lack diversity of thought (even though they might represent good "culture fits!").

We want to have people from different walks of life, with different backgrounds, and with different mindsets, so that we can collaborate and create unique solutions. Your organization should have no place for a "them versus us" mentality, which already seeds a broken system. Doing better together takes a variety of perspectives and experiences.

After a nine-month field study eventually published in the *American Sociological Review*, Lauren Rivera, associate professor at Northwestern University's Kellogg School of Management, concluded that when hiring managers talk about "fit," they focus on things like hobbies and biographies. Have you ever heard of the airport test, the question of "would you enjoy sitting next to this person on a long flight?" Rivera stated in her report, "In many respects, [hiring managers] hired in a manner more closely resembling the choice of friends or romantic partners."[30]

The tech world has become obsessed with hiring for culture fit,[31] and has done itself (and the entire organizational ecosystem) a disservice as it has fed a growing diversity problem. For open ecosystems—communities and other organizations—to stay true to

30 http://www.asanet.org/journals/ASR/Dec12ASRFeature.pdf

31 https://www.theglobeandmail.com/report-on-business/careers/leadership-lab/techs-obsession-with-cultural-fit-feeds-its-diversity-problem/article37684343/

their values, building heterogeneous teams can boost performance, new ideas, and gain advantage.[32]

4. Build (talent), don't buy

Last year I interviewed Aaron Atkins of Slalom about a more open approach to talent acquisition.[33] Aaron heads up acquisition in Southern California for this open organization. He shared that Slalom doesn't seek out the "A-Players" but rather seeks people with potential for aligning creatively with the organization's goals. Once candidates are a part of the team, Slalom begins to build talent and create utility players. Atkins had this to say about a new way forward:

> It is how we are educating and training our new folks to move towards culture change. This all comes back to a build versus buy mentality. So some organizations are large enough that they can go in and buy. They can go and acquire a new company, or they can go hire a bunch of people in the sense that we're going to buy these folks.
>
> Slalom is much more of the build mentality of—how do we identify the right people, with the right capabilities, and train them to have the right skill sets. So it's moving more towards training and development of building our next level of talent.

Slalom realized they had clients seeking specific technical talents and there was an open space that needed serving. Recognizing they were losing money because they didn't have the "right number of folks" was not okay with them. Instead, they set about internally building competencies within their existing talent pool. Now, whenever someone is on the bench and not at a client site, they're trained

32 https://insight.kellogg.northwestern.edu/article/better_decisions_through_diversity

33 https://ldr21.com/ep7-build-dont-buy-talent-trends/

in the new skills to serve clients needs. Slalom creates utility players that can be cross-functional across a wide variety of solutions and services, which only increases their value from a market perspective.

Your challenge, then, is to take a hard look at your organization's hiring practices and methodologies. Transforming your organizational culture—your *way* of doing things, including *the way you work*—will require taking new approaches to build truly open organizations. Open organizations, at their core, must stand on all five principles to function and produce results (see Appendix). Begin by building inclusive practices as you seek out potential in either your existing talent pool or those you are looking to hire.

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Innovation through community

Alessio Fattorini

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

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

The crazy idea

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

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

On a Saturday in 2010, with pasties and espresso in hand, the Nethesis staff were discussing how to move things forward (hey, we

like to eat and drink while we innovate!). In spite of the momentum working against us, we decided not to change course. In fact, we decided to push harder—to make open source, and an open way of working, a successful model for running a business.

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

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

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

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

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

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

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

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

So we decided to build a community instead.

We realized that creating a community has so many benefits. For example, if the people who use your product are really involved in the project, they will provide feedback and use cases, write docu-

mentation, catch bugs, compare with other products, suggest features, and contribute to development. All of this generates innovations, attracts contributors and customers, and expands a product's user base.

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

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

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

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

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

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

Giving

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

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

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

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

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

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

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

A community isn't strictly a marketing channel

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

Clarify the relationship as soon as possible

Why has the organization decided to build a community and support the project? What does it hope to gain? Conversely, what will the community gain? A company should understand a community's needs and expectations in order to earn its trust. You can't ask people to devote their time if they think that you're making money from their volunteer efforts. Don't leave space for grey areas here. In our case, we stated that NethServer is a community effort, founded and sponsored by a company (Nethesis). Nethesis' business model is to sell software, professional support, and services to other companies, customers, and resellers. We use a portion of our revenue to fund the development of NethServer (official site hosting, community initiatives, sponsoring, and so on). Community and company have the same target: making NethServer better and more successful. And NethServer benefits enormously from the resources

that the company invests into it. The company pays NethServer coders to write features that the customers and users need and works with the community to make NethServer a better product. Because the company works in the open and as part of the community, and because the code is released under the GPLv3, NethServer itself will continue to be free. That's a virtuous circle—everyone wins.

Community managers aren't solely responsible for the community

Great leaders ensure that the *entire company* is responsible for working with the community. Community-centric companies involve participation from as many employees as possible, so they involve other staff members in community discussions and initiatives. Yes, you should hire a community manager if you're serious about building community. It should be a full-time role—someone in charge of facilitating the relationships between these entities, especially in the early stages. But the entire organization needs to support the community and its mission. For example, I personally am both the voice of the community inside company and the voice of the company inside the community. Actually, to succeed at the job, I must participate at a level that can appear to be disloyal to my employer and in favor of the community; I'm a kind of diplomat and translator between the community and the company. I'm really the middleman.

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

1. Be welcoming

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

In my community, for example, I create a welcoming post, in which I offer my warm welcome to the new people and ask them to feel safe and to introduce themselves: What are you working on? Why are you here?[34]

You would be amazed at how these simple sentences unleash positive behaviors from newcomers. You show not only that you've have noticed they're here, but also that you care about them, their lives, and their aims. Suddenly, they feel at home and compelled to participate, if only to give back and thank you for the attention.

You can't set the proper cultural tone alone. Creating an ambassador group might help.[35] This group should be the community's engine, a group that's able to set a high bar, nurture a culture, and share your community vision, mission, and values.[36] Our Ambassadors have a set of social norms and rules that they undertakes to respect: lead by example, be humble, be inclusive, be full of gratitude, show your passion, be playful.

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

2. Be inclusive

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

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

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

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

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

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

you ask."[37] It's a very powerful rule, and it helps us achieve an important goal: being inclusive.

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

3. Listen to your community first, then speak

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

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

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

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

> When we're close to ideas, what we hear is criticism. When we're open to criticism what we get is advice.[38]

Remember that every time you need to reply to someone.

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

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

4. Be transparent

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

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

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

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

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

Traditionally, much of the development that occurs in open source space happens in code repositories and bug trackers, and those are not places that users of the software tend to hang out. This separation between developers and users means users don't really see development discussions happening, and contributors may not always get feedback or well-deserved acknowledgments from users.

We use our community platform on Discourse for everything: support requests, bugs, testing processes, development discussions, community organization—really everything![39] We use GitHub just to keep track of issues, code changes, pull requests, and technical stuff. This means developers can help people with support questions, for example, or they can help with the community discussions. They could be pretty involved everywhere.

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

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

5. Lead the support, at least at the beginning

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

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

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

- Called into question, people will be more inclined to participate and lend a hand
- People feel like experts in the field, and that helps them realize their own strengths
- Newcomers will feel like they've truly helped, and they'll often be thanked for their efforts, which is very satisfying

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

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

Taking

As I've already mentioned, our product wouldn't be what it is today without the vibrant community that surrounds and supports it. So let's discuss how that happened by exploring what your organization should expect to receive from its investment in people. You'll be

able to see the kinds of benefits that will take your business to the next level—and beyond.

Let's review six benefits.

1. Innovation

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

You may know that "the best way to have a good idea is to have a lot of ideas."[40] You can't always expect to have the right idea on your own, so having different point of views on your product is essential. How many truly disruptive ideas can a small company (like Nethesis) create? We're all young, caucasian, and European—while in our community, we can pick up a set of inspirations from a variety of people, with different genders, backgrounds, skills, and ethnicities.

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

2. Research

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

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

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

in isolation with limited resources. In this day and age, thanks to the advent of open source communities research department is opening up to the entire world.

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

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

And third, communities help you generate comparisons with other projects. You can't know all the features, pros, and cons of your competitors' offerings. The community, however, can.[41] Ask your community.

3. Perspective

Communities enable companies to look at themselves and their products from the outside,[42] letting them catch strengths and weaknesses, and mostly realize who their products' audiences really are.

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

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

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

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

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

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

4. Development

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

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

But the community doesn't just create code. It can also generate resources like how-to guides,[43] FAQs, support documents, and case studies. How much would it cost to fully translate your product in seven different languages? At NethServer, we got that for free—thanks to our community members.

5. Marketing

Communities can help your company go global. Our small Italian company, for example, wasn't prepared for a global market. The community got us prepared. For example, we needed to study and improve our English so we could read and write correctly or speak in public without looking foolish for an audience. The community gently forced us to organize our first NethServer Conference, too—only in English.[44]

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

A strong community can also help your organization attain the holy grail of marketers everywhere: word of mouth marketing (or what Seth Godin calls "tribal marketing").[45]

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

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

6. Loyalty

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

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

Conclusion

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

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

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

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

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

As my friend and mentor David Spinks keeps saying over and over again, "Companies fail their communities when when they treat community as a tactic instead of making it a core part of their business philosophy."[46] And as I've said: Communities aren't simply extensions of your marketing teams; "community" isn't an efficient short-term strategy.[47] When community is a core part of your business philosophy, it can do so much more than give you short-term returns.

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

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

And it can make you a whole lot of money.

Community-driven companies will always win. Remember that.

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

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

What it means to be an open leader

Jim Whitehurst

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

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

Context shapes culture

Culture is something management gurus are increasingly taking more seriously. "Culture eats strategy for breakfast[48]," I've heard people say. But I'm not sure that all of those folks truly understand *why* this is the case.

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

Being a leader in an open organization, then, means making connections: It involves doing the work of linking people both to each other and to some larger, shared picture. It's helping people understand how they can contribute to a collective effort in meaningful ways.

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

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.[49] 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

49 See DeLisa Alexander's chapter in this volume.

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.

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An open leader's guide to better meetings

Angela Robertson

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

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

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

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

Successful meeting basics

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

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

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

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

Again, the first step to leading a successful meeting is *deciding the goal of the meeting*. In general, meetings fall into one of the following categories: *administrative, tactical, strategic, developmental, and personnel*. But the specific *type* of meeting you host depends on the goal of the meeting. In this chapter, I'll briefly discuss each of these meeting types:

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

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

After you've identified the type of meeting you're leading, set the agenda, and send it in the meeting invitation. Also state your ex-

pectations for participation. If you're hosting a meeting online, for instance, do attendees know if video is required? Will the meeting be recorded? Make sure these expectations are clearly stated in the invitation.

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

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

Daily stand-ups

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

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

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

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

If you're a project lead, these meetings are an indispensable tool for you. They afford a degree of transparency that allows leads to know exactly where team members are spending their time. Everyone is invited to contribute in the same way, so it's an inclusive gathering that gives equal opportunity to contribute and listen. I find that listening leads to collaboration, too, as I can build on the work

others outline in a stand-up. I've led stand-ups, and I love that the short meeting focuses the team on achieving the sprint goals so we have impactful work to share in the end-of-sprint demo.

Team meetings

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

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

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

Decision-making

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

Decision-making meetings occur in time set aside to share updates on an assignment, and you should always *begin* the meeting by stating that you wish to arrive at a decision by the *end* of the meeting. For example, if you've been asked to lead a vendor program, then (beginning with your proposal for work) set aside time for an update and include the fact that you expect a "proceed or pause" decision at the end of the meeting. In advance of the meeting, summarize why a vendor program is necessary, what success looks like, and what you need to proceed. Share this information in a writ-

ten document, and allow time for a review of the material at the start of the meeting. Always grant enough time for questions and propose that you have enough information to proceed with the task. Then ask if anyone has objections.

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

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

Learning

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

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

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

lected team's experience. That way, in preparation for the learning-focused meeting, every team has acted to prepare.

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

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

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

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

Brainstorming

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

Ideally, you'll have everyone physically present in the same room when brainstorming. But even if everyone cannot be in the same room, I find that you can still have an effective brainstorming

session as long as the team understands the rules for communication. As a leader, you should be clear about questions like:

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

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

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

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

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

One-on-ones

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

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

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

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

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

- **Priorities and risks.** For managers and team members, it's easy to think that things are going well, but there are often challenges. People want to give off an "I've got it all together" vibe to insulate themselves from risk. The thing is: Work is risky. Most jobs involve work that's ambiguous and uncertain. So make sure you don't forget to discuss risks.
- **Roadblocks and learning.** Often, certain things prevent us from moving our work forward. Managers

need to know about those things in a precise and candid way. And even if they did, we can't always wait until we have everything we think we need in order to proceed with a project. We can work with a growth mindset so we, as a collaborative team, can share what we learn from mistakes and new information.

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

Delegations

Delegation meetings occur when leaders need help meeting all their strategic priorities. But open leaders understand something additional: Delegation is also a way to empower those around you—to build, in other words, *a culture of shared responsibility*.[50] Through our adaptability, delegation becomes all the more possible—indeed, almost inherently essential—for the organization to thrive and grow. And the challenge that often makes delegation difficult is *trust*. If you cannot think of anything to delegate, perhaps you believe that you cannot trust your team members to share your responsibilities.

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

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

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

1. State the work being delegating and seek confirmation that the delegation has been accepted.
2. Inventory the work that the employee is tasked to complete.
3. Ask the employee to give each work item a priority and deadline.
4. Using your knowledge of the business strategy and customer commitments, collaborate to establish priorities.
5. Put the priorities in writing, identify quality standards, and set deadlines.
6. Set expectations regarding status updates, and confirm you both understand how the employee's current workload adapts with the new work and deadlines.

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

Performance reviews

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

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

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

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

Skip level

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

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

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

One final note about skip level meetings: Senior leaders are often curious about "what's really going on" in their organization. If

you're concerned that a senior leader needs to know something that they seem unaware of, bring up the topic. If the leader is listening, she'll ask for your candor. Some people have told me that nothing is "off the record." I argue that this really depends on the leader. Personally, I respect off-the-record disclaimers and appreciate the transparency people are willing to bring to a skip-level-type meeting.

Off-site

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

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

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

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

Off-site meetings are successful when attendees are vulnerable with each other about their concerns and engage in conflict-heavy discussions. A team might not share all details as transparently as they share details from other types of meetings. But I

encourage transparency here, because it gives the larger team perspective about the thought and candor that went into the discussion. That said, however, airing dirty laundry isn't helpful when you want the larger team focused on asking clarifying questions about the strategy and working out tactical details for implementation.

All-hands

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

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

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

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

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

As you're used to reading by now, record and share.

Conclusion

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

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Making cultural transformation manageable

Heidi Hess von Ludewig

In a scene in from *Game of Thrones* (the third episode of the seventh season, to be precise), Tyrion Lannister is talking to the King of the North, Jon Snow, about the army of zombies approaching from the North, beyond the Wall. Tyrion's evil sister is sitting as Queen of the Seven Kingdoms and John is wondering why people don't listen to his warnings. "People's minds aren't made for problems that large," Tyrion says. "White walkers, the Night King, army of the dead—it's almost a relief to confront a comfortable, familiar monster like my sister." Sometimes, the best way to succeed is not to confront the entirety of the issue.[51]

The same is true about creating change in an organization. Because change is difficult, it can feel insurmountable in any organization (especially a mature or large one). Both problems and solutions can feel too big or broad for us to address. We don't often know which steps to take for a number of reasons, and we might feel a lack of support, fear of failure, or uncertainty about where to start.

But change doesn't *have* to be big. And if we're trying to change without the context of an urgent situation, then I would assert that change *shouldn't* be big: Change just needs to be effective, because we can build on every effective change, one at a time. Rather than try to tackle change at an intimidating scale, we must

51 For more open leadership lessons from Game of Thrones, see: https://opensource.com/open-organization/18/7/open-innovation-lessons-game-of-thrones

learn to spark change at a level much smaller, more modest, and more manageable—like with individual projects.

This chapter describes ways that we can create cultural change one project at a time—rather than "boiling the ocean" to warm our organizations for culture change. When we use our projects to spark change and start to succeed, others can emulate us and transform how they work too. In fact, that is how grassroots movements start: through showcasing the ability to change and demonstrating how change works at the small scale. There's no difference between grassroots movements inside and outside the workplace; the mechanisms are the same, as I will explain.

Culture is the "how"

The first thing to do is differentiate between the "how" of change and "what" of change. Business systems have similar definitions of "what" needs do be done—manage work, make profit, sell products or services, pay people, provide benefits, etc. "How" those things are done is the difference between *open* and *conventional* organizations.

Open organization values showcase *how* organizations operate—the principles that influence how they run to increase participation, help information flow easier, and generate innovations. Transparency, for example, describes *how* open organizations communicate (if they aim for authenticity). Inclusivity describes *how* open organizations promote participation among members. The values and beliefs are part of the foundation that makes a culture—yet they are not, themselves, culture.

Culture is a set of values and beliefs *enacted through behaviors and actions*. We "know" what a particular culture values because of *how* people living in the culture do things. For example, how do people discuss things (o how *don't* they discuss things)? What is salient or available as a topic of conversation? How do they celebrate traditions, with whom, and how frequently? In the case of workplace cultures, these questions transform into ones like "How are meetings run?" and "Who's included?" and "What happens when someone expresses a dissenting opinion?"

Our answers to those questions help us infer the values and principles that motivate observable behaviors, because the *enactment* of beliefs and values in the form of behaviors is how cultural values get instantiated. If we want to better understand a culture, we can assess social behaviors and infer values from them in order to more fully understand a culture's beliefs. We can in other words, *reverse-engineer* our understanding, starting from behavior and ending at values. However, if we want to change a culture, then we need to use *forward-engineering* to figure out ways to change those behaviors and actions in order to change beliefs.[52] That means we need to look for simple but concrete ways to enact open organization values in our everyday work, and one way to do that is by focusing on specific projects.

Project management is the "what"

Project management is a "what"—*what* to do to organize and perform the work—and, if done well, it has the ability to connect the "what" of behaviors with the "how" of beliefs and values that form open organization culture. As a sanctioned methodology, project management is likely already something that an organization and its actors value as a way to work, so it provides a ready framework for adopting the "how" of desirable cultural values.

The choice of project management methodologies certainly matters; each has its drawbacks and benefits. But what matters most is *how* activity gets accomplished. The Open Organization Definition (see Appendix) describes the principles (*how* something might be done) that can inform all kinds of work at different levels of an organization, regardless of whatever particular techniques or behaviors an organization enacts (*what* they choose to do).

For example, Agile is often aligned with open organizational thinking because these schools of thought share similar principles. We might consider them corresponding "cultural artifacts." Agile (just like its dramatic foil, Waterfall) is a project management

52 Yes, I said that correctly; you change behaviors first.

method—a set of concrete behaviors and techniques. Those behaviors and techniques both reflect and perpetuate *a set of values* that underpins them (see Figure 1), which, by and large, are open values. In many organizations, a variety of methodologies co-exist, because over time different teams have adopted different styles of working; intra-organizational groups have differing abilities to adapt to particular methods (not every team can iterate or use project management tools), and each methodology has drawbacks (e.g., the "technical" debt of Agile).

Although Agile naturally supports open values, multiple project management methods can and often co-exist and are beneficial when the same set of values defines and drives them.

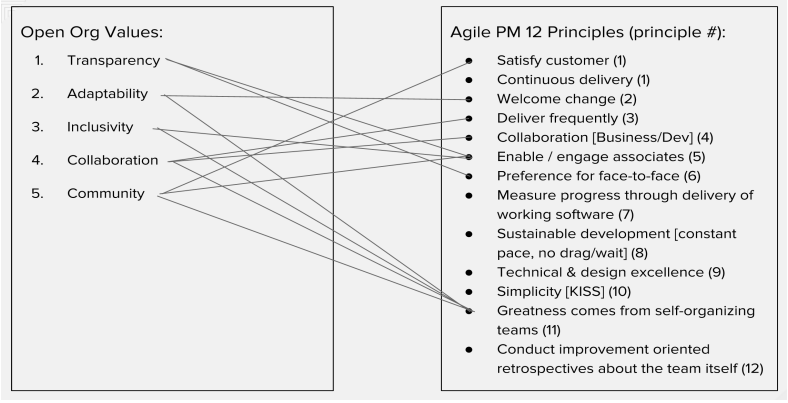

Figure 1: Relationships between open organization values and Agile principles

Stages

Each stage of a project management method encomapsses activities that leaders can use to promote the "how" of open organizational culture. There are generic stages (meaning you'll find them in just about any methodology) but their specific *enactment* will depend on the methodology you've chosen (e.g., Agile's short cycles will manifest differently than Waterfall's longer cycles).

Those general stages are:

- Initiation

- Planning
- Executing and Controlling
- Closing

Let's examine each one.

Initiation

In the initiation stage of any project, people seek to outline information about the launch of a project. This is the phase in which people address questions about the benefit of the project. It usually includes activities like stakeholder analysis, benefits analysis, deliverable identification, and risk identification. This is typically a more "internal" part of the project methodology, meaning that project sponsors and key leaders are engaged in this work.

The initiation phase of a project is a stage in which leaders can increase transparency, inclusivity, and collaboration by communicating early about project details and team membership, and by sharing prior knowledge and information to cultivate an early project community. For instance, leaders sometimes wait until projects are clearly defined before talking about them, delaying presentations in order to provide answers to any questions that associates might have—but that can mean that no one really knows about the project and that the project is defined to a point at which it's not inclusive of feedback. So sharing project details often and early during the initiation stage means leaders might take some questions for which they don't have answers, but they benefit both from having ideas and feedback circulate, and from building associates' commitment by including them early.

Planning

In the planning stage, project details become more defined and clear. It's a great moment to forward-engineer an open culture, because decisions about *what* and *how* most often occur during planning. Using the planning stage as a platform for change increases buy-in, because it helps provide early context for team members, effectively "bringing them along" on your vision (rather than having to explain it and convince them later).

This stage focuses on determining: project requirements, constraints, and assumptions; project schedule, scope, and resources; roles and responsibilities among and between the various teams and members; communications plan; quality management plan; and change management plan. It also includes review and signoff of plans and documents and a project team kickoff.

The exciting part of this stage is the ability to discuss and compromise that it affords. Leaders shouldn't be afraid to let team discussions take them to new places. This is where "the road gets paved." *How* you enact the process (the values that will guide what you do) get sedimented here. Be inclusive and collaborative by supporting fluid role definitions. Make communication plans broad and transparent. Focus on (and encourage) interlock and the development of a broader sense of community between organizational teams is a focus and encouraged.

The Open Decision Framework is a resource you can use to help define *how* open values will manifest in the ways a project team will make decisions.[53] It's not a prescriptive mechanism that teams must aggressively follow; it's something project managers and teams can adapt to their own situations and different types of decisions (i.e., teams might manage short-term technical decisions differently than strategic technical decisions, or might have different guidelines about decisions that involve change or risk mitigation).

Executing and controlling

Plans laid in the prior stage get performed, evaluated, and continuously improved in this stage. Task execution, plan enactment, performance measurement, implementation of changes and corrective actions, risk monitoring, quality measurement, and relationship maintenance (between team, stakeholder, sponsor) are key.

Changes and corrective actions can provide opportunities for promoting adaptability. Increasing transparency in reporting and communication can increase community-building and engagement

53 https://opensource.com/open-organization/resources/open-decision-framework

between project groups. And including external groups in a consultatory way during change management and decision making can lead to greater inclusivity and knowledge sharing, ultimately aiding problem solving and solution building.

Closing

Closing can apply to an entire project, a phase, or an iteration. It includes performance measurement, project review, and transition planning. Providing archives in a public way helps to make the success and learning outcomes of the project more transparent. Feedback techniques such as retrospectives could include all project groups including customers and sponsors. And, by all means, when closing a project record yourself as the leader so associates can connect with you with questions they have about the work you did.

Culture change one project at a time

Projects are a unique opportunity to begin transforming to an open organization culture one step—one activity—at a time. Project management methodologies describe the *activities* that a team performs in order to organize and manage complex cross-team and cross-organizational work. By *defining "how" those activities are performed*, we can begin to infuse our work with open values, no matter the kind of organization we find ourselves in.

Defining "how" is not the only task, of course: Accountability for enacting the values that a project team has defined is the responsibility of everyone on the project, and needs to be a focus in every moment that the team performs its work. Without the team engaged in working toward an open organization, culture change won't be possible.

Starting small, aligning *how* with *what*, is a manageable way to start making those changes.

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To survive Industry 4.0, leaders should think beyond the digital

Jen Kelchner

The 2017 Red Hat Culture Survey[54] found that digital transformation is changing business inside and out. Most respondents (91%) agreed that technological developments are altering the way organizations in their industries must operate in order to succeed.

That's going to require those organizations to take a hard look at the frameworks that guide their work, the values they adhere to, the mission that aligns them, and the operational processes that drive the engine of change—in other words, their organizational cultures.[55] It's clear that (due to the various types of transformation going on) we must address not only operational needs but also *the way we think about doing work itself*.

Yes, our frameworks—our systems of organizational governance, our standard processes for decision-making, etc.—will need to change, because the rules of engagement have changed. But if we've only implemented new processes and frameworks and *still* haven't developed agile people and empowered them with the skills they need to adapt to change, our change efforts will continue to fail. Currently, the focus of so many change efforts has been on the *digital aspects* fueling innovation sprints—*without* addressing the key needs to be evaluated in advance of implementation and changes.

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54 https://www.redhat.com/en/blog/red-hat-releases-2017-open-source-culture-survey-results

55 https://hbr.org/2013/05/what-is-organizational-culture

But at the heart of what we call "digital transformation" isn't just technology. It's people, too. When we forget that, we put our organizations in danger.

So in this chapter, I'll explain how those traditional rules of change management are shifting, then explain how your teams and organization can succeed with their transformations by *thinking beyond the digital*.

New rules of engagement

It's time to step *beyond the digital* in order to succeed in the rapid state of innovation we're all experiencing. It's time, that is, to change the way we think about the value of the people in our organizational ecosystems by empowering them to rapidly respond to this change, and by providing the necessary skills and tools for becoming fluent in the critical task of engaging with change.

Last November, when interviewed on CNBC's Squawk box,[56] Red Hat president and CEO Jim Whitehurst said, "We found that when projects typically fail, it is usually not the technology, but has much more to do with the way companies operate." Jim went on to say that companies looking to transform the ways they work must examine their *cultures, processes, and systems*.

In response to Jim's assertion, host Joe Kernen replied:

> Does every company need to hire millenials? Who else knows how to operate in the current environment? It seems there needs to be a mass transformation that must happen to change the way people think to get to open source, digital, and embrace new technology.

Kernen's position sounds familiar. The 2018 Deloitte Millennial Survey offers the subtitle "millennials are disappointed in business and are unprepared for Industry 4.0"—before even launching into the study.[57] The survey's finding lead to a staggering awareness that organizational and people team leaders have not taken millennial

56 https://www.cnbc.com/video/2017/11/27/red-hat-ceo-projects-fail-because-of-how-companies-operate-not-technology.html

workforce development seriously. These leaders are underprepared for the speed of innovation and lack basic teaming skills.

According to 2017 statistics:[58]

- 56 million millennials currently are in the workforce, making it the largest group.
- Gen Z began entering the workforce in 2016 and now comprise 5% of the workforce.
- Millennials will be 75% of our workforce by 2025.[59]

But are the millennials in your organization *really* pushing all the change typically tied to digital transformation? Or is it the case that your *entire business* hasn't really upgraded its operating procedures? While millennials are the trending scapegoat, let's be honest: millennials are not who or what is prompting the need for change in your organization. And while it isn't about millennials or even digital transformation, Kernen was right about one thing: *For transformation to happen, people need to change the way they think*.

As the composition of *technologies* inside our organizations changes, so does the composition of *people.* And that means the composition of *expectations* is changing, too. If you expect your company to not only succeed but *thrive* in the 21st Century, you'll need to make an immediate investment in interpersonal and managerial competency training.

The speed of innovation

We live in an age of innovation featuring rapid cycles of change. Futurist Gerd Leonhardt estimates we will see more change between 2015 and 2035 than in the prior 300 years of modern history.[60] And the cycles of innovation will not be slowing down. (In fact,

57 https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-2018-millennial-survey-report.pdf

58 http://www.pewresearch.org/fact-tank/2018/04/11/millennials-largest-generation-us-labor-force/

59 https://www.forbes.com/sites/workday/2016/05/05/workforce-2020-what-you-need-to-know-now/#9d39c722d632

60 https://www.futuristgerd.com/future-thinker/

they will be speeding up.) To effectively understand this change, we need to step back and see the large scale impact of this age.

The source of this change is far more than "digital transformation" or "emerging technologies." We are a connected and aware generation that consumes information in mass volumes in real time through handheld devices.[61] Policy and regulation are changing. Political upheaval is occurring. New business models are emerging. New markets are appearing. We are part of a global marketplace and a much larger ecosystem, and as with all ecosystems, the slightest shift in a single part can cause radical changes throughout the whole.

In previous decades, engaging in change has generally fallen into two initiatives: *change readiness* and *change management*. Change readiness involves processes focused on controlling the change, *but does not allow for what happens outside of that controlled space*. Change management consists of building and executing the roadmap to roll out changes, *but has been failing at a rate of about 70% for many decades*. Organizations have been able to navigate change solely by using change readiness principles, which are based on internal control of change and predictability during a process. We can no longer expect to do business according to operations and rules for sailing while navigating a lake full of speedboats.

The current speed of innovation in the market, the move to open organizational models, and the shift to more agile and project-focused working groups have caused us to throw out our playbooks for "normal" business operation. Truth be told, whether your organization is open, closed, or somewhere in between, you must begin to acknowledge the new playing field we're on and embrace the skills needed to thrive in it. In order to thrive (and not just survive), people and organizations alike must begin thinking beyond *processes and tools.* We need to begin focusing on *people's capabilities* for responding to change.

61 https://bits.blogs.nytimes.com/2009/12/09/the-american-diet-34-gigabytes-a-day/

Change readiness focuses on the *value of the people*; their contributions, and the insights they glean from working together, will address the challenges for both the disruptors and the disrupted. Since the speed of innovation and change is only increasing, we must become change-ready. We must have the skills to become rapidly responding, agile humans who can ride the wave of change rather than allowing the chaos to control us, our teams, and our business.

Transformation beyond the digital requires a new approach to the way we build agile, open organizations, and it will need to start with how we empower our people to engage continuous cycles of change. With the advent of Industry 4.0, we need empowered, engaged change agents more than ever.[62]

Humans *drive* change. Humans *sustain* change. And failing to invest in people as they grapple with change could be problematic for your business.

This means a new way of thinking *and doing*. Our efforts to make technology work for *humans* require applying human dynamics to solutions rather than just *technologies*.

An inclusive, holistic approach

Transformation needed for our workforce, business models, and organizational ecosystems must go beyond "digital transformation" alone. However, our approach to building applications, systems, and new technologies cannot be the same one we use use to train, engage, and prepare people. Digital transformation, policy and regulation changes, new business models—all are tools, vehicles aiding the achievement of new ends or goals. But they're not driving the change.

The change engine itself is fueled by people. That means change is personal and response varies by context.[63]

62 https://www.forbes.com/sites/bernardmarr/2016/04/05/why-everyone-must-get-ready-for-4th-industrial-revolution/#166d57113f90

63 https://opensource.com/open-organization/18/5/navigating-disruption-2

For example, you've probably worked on projects with someone who seemed resistant to the initiative. They may have asked 1,000 questions. Or they wanted to continue to reiterate, over and over, the legacy of what had already been built. As an innovator, your likely assumption was that they were being "wet blankets" to the team and initiative and thus had no place on an innovation team. (Am I right?!)

Or maybe this was the case: As a detail-oriented risk mitigator, you might have been given a project full of creatives you don't understand. It is frustrating. The need to move fast, without details or a risk assessment? It boggles your mind. You're thinking, "Vision is great and all, but let's talk about the potential pitfalls along the way." It has raised all of your red flags, and your assumption is they aren't in touch with reality (and might not even be that good at business).

Each of these (too common) scenarios depicts a mismatch of attitudes toward change. In our work at LDR21, we've discovered that people engage change across a spectrum of filters. The output of the change engagement—a "change language," if you will—reveals a person's positive contribution to either drive change (and aid in adaptability) or to optimize and sustain the change. When combined with interpersonal competency development, this awareness of positive contribution allows each person in an organization or on a team to understand how to navigate change by leveraging their strengths. For instance, if a team understands that Joe is asking so many questions because his change skill is *detail and risk mitigation*, they're better able to understand Joe's value in building a solid plan that can be effective and efficient. And if Allison's change skill is recognized as *gaining buy-in from others* as she seeks to hear from underrepresented voices, the team can understand her particular approach to change management. A team employing it's change skills effectively is a balanced, well-running change engine.

This awareness also helps people avoid feeling displaced or underutilized—like they're not contributing value to a process or project. It provides them with a vocabulary that aids in their being

understood. Taken together, this increases engagement and fulfillment in joint work, as everyone is operating from a more natural and comfortable position.

When a leader leverages this information to build a well-balanced, high-performing team, they're providing the entire organizational ecosystem with an engine of change that can now "surf the wave" of innovation rather than be caught in the undertow.

Each person in your ecosystem has the capacity for positive contribution and value to either drive, adapt to, optimize for, or sustain change. Everyone has the capacity to be a valuable contributor, to channel the way they engage with change, and to make it work for everyone. This understanding combined with interpersonal competency training is what will drive the engine of change.

To become a truly open organization, the shift to people development with interpersonal and change competency development must be a top priority for anyone looking to sustain growth.

Jen Kelchner is the Founder of LDR21, a firm focused on building agile, open people and organizations that are able to meet the demands of continuous cycles of change. She advises organizational leaders on open leadership, cultures of trust, and engaging change based on open org principles.

Creativity is risky (and other truths open leaders need to hear)

Heidi Hess von Ludewig

Leaders are all too aware of the importance of invention and innovation. Today, the health and wealth of their businesses have become increasingly dependent on the creation of new products and processes. In the digital age especially, competition is more fierce than ever as global markets open and expand. Just keeping pace with change requires a focus on constant improvement and consistent learning. And that says nothing about building for *tomorrow*.

Organizational leaders know that fostering creativity and innovation is important, but they don't often take time to understand how specific workplace contexts—concrete processes and elements—fit together to make creativity and innovation possible. This chapter offers a birds-eye view (and, let's face it, a short treatise) on the nature of creativity and explains how it functions in an open organization.

What creativity is—and isn't

Researchers often define creativity as a product or a process that is novel and useful. This definition is a broad one that winds up leaving a lot of room for interpretation: What is new, and to whom? What is useful, and to whom? Creativity can involve the production of something never built (an idea) or something instantiated or materialized (a technical or artistic innovation). In fact, the word "innovation" is a business term used to indicate an instantiation of creativity (not just an idea) that's intended for sale or benefit in the market.

Despite the stories we tell ourselves—the one-man myths about lone-wolf inventors working diligently and logically to have a Eureka moment—creativity is messy, social, and full of risk. Creativity can be individualized, but it often opens possibilities for social intersections. Traditionally, research on creativity has focused on the individual as the sole site of creative activity, but, over time, social and collaborative practices (such as ideation) have become more important objects of analysis. No one creates in a vacuum. Take, for example, one typically overlooked concept in studies of organizational creativity: social evaluation, or the processes and practices colleagues use to judge the creative work we produce. In the case of innovation more broadly, social evaluation might include judgment of a product by a market (especially if we're talking about adoption of a product): What is this? What need does it fill? What does it do well/not well? Do we like it? Would we buy it or use it? In both cases, we see a kind of social force "pushing back" on our lone genius creator, shaping her ideas and influencing the creative process.

In fact, the characteristic of "novelty" implies a conversational or dialogic aspect of the creative process itself: problem identification. If things are going great—if there's nothing wrong—then why make anything? Why create? Something motivates creative practices; they don't simply happen. At the heart of "creativity" is a desire for some kind of improvement, or a desire to alleviate something.

Creative people want to change something, and with that change comes risk. Creativity and innovation are essentially conversational and negotiated. They involve asking (overtly or implicitly) questions like: Do you want to change and is the change worth the risk? "Risk" in this case is a general concept: risk to using or doing something new when the outcome is uncertain. Most of the time, risk seems fairly low (for example, How risky is it to buy and use a new smartphone?). Everyone has a different sense for risk this size; some people will find the risk low and some will find it higher. But an uncertain outcome is the greatest risk to creativity—and and it's inseparable from the creative work we do.

The ability to manage the *risk* of creativity (individually and socially) is key to being creative and doing creative work.

Two approaches to risk

Researchers consider three areas of creativity: individual, social, environmental. (In this chapter, I use "social" to mean the team or group with which the individual works, and environmental includes organizational factors, such as culture, seen from a macro-social perspective.) All of these influence and are influenced by the other.

In conventional organizations, especially those created by the mid-20th century, the overarching impulse is *control*. Top-down governance functions as a way for large organizations to coordinate activity across thousands of employees. Information flow is more controlled, because too much information access (or an incorrect amount of information conveyed) contribute to loss of control and coordination. Expertise is critical, but experts are those who have the required experience and knowledge to make decisions in the control environment and, as such, have special access to decision makers and information. For conventional organizations, then, control is about risk reduction; risk tolerance in these environments is *lower* than other organizations.

Open organizations, some of which were created in the latter quarter of the 20th century, focus much more on contribution. In these contexts, everyone is encouraged to contribute, not just the experts, and more employees have access to information and decision makers. The underlying hierarchical formation might be top-down (the basic structure), but the accountability hierarchy is bottom-up and side-to-side (sometimes making it feel like a house of cards!). Control of information is not as tight, and sharing is based on factors other than "need to know" (that is to say, a culture suffused with transparency means that when you ask, you generally receive). More information, more people contributing, and more access means more risk, generally speaking; an organization that is accustomed to increased risk in its day-to-day operation will natu-

rally have a higher risk tolerance, thereby increasing the likelihood of creativity and innovation.

Modify, try, learn

Creativity and innovation has a repeatable (albeit messy) and asynchronous process that roughly starts with problem identification, and continues with ideation, solution implementation, and evaluation. The cycle is iterative, overlapping, and stops and starts during any one of those activities—identifying problems in the solution, brainstorming in the evaluation stage, evaluating as part of problem identification, and so on.

Jim Whitehurst describes a cycle of innovation in his article about the "death" of long-term planning.[64] Jim proposes a new way to think about organizational planning: not plan, prescribe, execute, but try, learn, modify. This, he says, has multiple implications for organizational process design: shorter activity cycles, higher tolerance for failure, and adaptable structures, etc. In some ways, however, starting a description of that iterative cycle with "try" assumes the cycle of creativity is already in motion; the initial "modify" (problem identification) that started the creative process is presupposed. For creativity researchers, "modify, try, learn" has an alternative meaning and can be aligned with specific phases of the creative process. In short, everything we "try" is always already a "modification" of something else—another attempt, process, or idea that precedes us. So we will start at the beginning: Where does creativity come from and how? It starts with the individual, or a group of individuals, who have a problem to solve.

Modify (problem identification)

The "modify" phase of Jim's cycle of agility is akin to "problem identification" in the creative process. Something needs to change (needs to modify) in a new and useful way. I call this a "contradiction" in the system—the system of work or behavior is broken in

64 See Jim Whitehurst's book, *Organize for Innovation*, and https://opensource.com/open-organization/18/3/try-learn-modify

some way—and the system needs to be modified to accommodate a solution to the problem.[65]

In this phase, associate empowerment and motivation, risk tolerance, access to resources, "permission," and information are integral to believing in and using one's ability to initiate change and search for a solution. In an open organization, these variables are better aligned with the values of the organization than in top-down conventional organizations. One benefit of having an organization based on open values (along with leaders who embody them) is that the organization's focus on inclusivity and its support for a diverse set of skills, experiences, and passions creates a base of employees empowered and motivated to address problems. The ability to access resources in an egalitarian way is important here. "Resources" includes other people—like leaders—who are an important resource because of the ways information and various skills can be shared among and between associates. In this way, the tools and ability to connect with others in the organization is foundational to empowerment and information flow.

As open organizations are more associate-centric than leader-centric,[66] permission needn't come "from the top" as much as it does in conventional organizations, where work and workers are more closely managed. "Open organizational" seems frequently to imply permission to engage associates in organizational-changing, product-changing, business-changing activities.[67] Because of their reliance on transparency, information is increased—almost to points where prioritization and organization of information becomes its own skill.

An organization's degree of risk tolerance is critical. Risk tolerance impacts both motivation—the ways employees think about

65 See Hess von Ludewig, 2014, p. 81, from https://catalog.lib.ncsu.edu/record/NCSU3105906

66 https://opensource.com/open-organization/18/6/building-professional-social-networks-openly

67 https://opensource.com/open-organization/15/8/request-for-comments-in-the-open-organization

problem solving and what's at stake for their livelihoods and careers in the event that ideas fail. Controlling *risk* means controlling *creativity*, because *creativity is risk*. So the less risk-averse an organization is, the more tolerant it is of creativity and innovation.

Try (solution implementation and experimentation)

The "try" phase of creative work is the one in which a solution is designed, implemented, and tested. Again, we can see where the values of the open organization are aligned closely with what is needed to support creativity in this stage.

The characteristic of "usefulness" implies that the proposed solution has social elements (i.e., to whom will it be useful?). If creative individuals have not consistently engaged their communities and connected with others, this is another phase in which they might do so because the complexity of problems and solutions requires a collaborative effort.

Social evaluation of the solution and community support for experimentation and tolerance of risk is integral here, as is the ability to access associates at any level in the social network and equanimity in accessing resources and information. Once a solution develops, the ability to share with others, get broader feedback on it, and be adaptable to its outcome is desirable.

By pointing out a phase called "try," Jim is suggesting that we leap into the unknown of implementing—of moving from identifying the problem to a new, different place. We often hear the mantra "fail early, fail often," but a more positive approach to this same concept would be "try early, try often." Why would we try early? Because creativity and innovation take time. Why would we try often? Because the first solution is often neither the best nor the only one, and if the first solution is merely a messy first attempt, then many attempts might be needed and the tolerance for risk. Being messy is important to "trying often."

Learn (evaluation and takeaway)

Although Jim points out that "learn" is a phase in his innovation cycle, it is really a context, the foundation of innovation and creativity.

Learning is not separate from any phase, but is present and continuous. When need and motivation dictate but new information, ideas, or connections are sparse, how can we create something novel? If you have an organization whose focus is perfection, then you don't have a learning organization, nor do you have an organization that tolerates risk, adaptability, or inclusivity. Learning is messy, and open (divergent and organized across multiple matrices of thought connecting together in sometimes unexpected ways). We learn by reading, doing, playing, and talking to others in our communities. Transparent feedback from communities and social networks contributes to our learning as well.

Learning is "made ok" by the idea that perfection is not required and failure isn't final but is, instead, a part of the creative process—a mere indication of something that needs to be changed.[68] Learning means we can modify and try again, re-initiating the cycle.

Acknowledging negative influences

Open organizations often provide contextual influences that foster creativity and innovation but "influences" aren't automatically positive forces. As with anything, there are influences that actually hinder processes too. For instance, in an associate-centric network, promoting adoptions of new innovations can be difficult, because associates can't lean on leaders to help them when leaders are trying to "guide and ask" rather than "manage and tell." This means that the threshold for adoption might be higher and is the responsibility of the associate making it more difficult to achieve.

Because open organizations place a premium on adaptability, they occasionally encourage a culture of "learning as you go." In the-

68 Incidentally, a great example of this philosophical view of failure is in the children's book *Rosie Revere, Engineer* by Andrea Beaty. Rosie's experiences a "flop," yet her attempt is celebrated for the helpful information it contains about the problem and the solution's next step.)

ory, this sounds helpful because it's based continuously improving our knowledge and, generally it is, but creativity studies show that a minimum amount of knowledge is necessary for innovative thinking[69] —and that having little or no understanding of an area of knowledge can be as detrimental as having too much (whereby significant expertise without the openness of continual challenging knowledge can, likewise, create patterns of problem solving that no longer apply).[70] So leaders shouldn't seek to hire people who are just "good learners" but who have a base of knowledge in an area or that can be extended in an area in order to provide that solid, foundational understanding creativity needs.

Ultimately, this exploration of creativity emphasizes a crucial difference between *creativity* and *innovation*. As we've seen, creativity can involve ideas never shared or implemented; innovations, on the other hand are *ideas materially instantiated*. Processes designed to foster ideas in an organization are not always the same processes designed to foster *innovations*—and applying the wrong techniques in the wrong situation can often lead to frustration and confusion.

Execution, for instance, is a focus of our example above (particularly in the "try" phase of the "innovation cycle" we've described). Open organizations can find themselves in situations where they lack the decisiveness and leadership required to make headway on implementing solutions, sometimes with the fear (and excuse) that "things are always changing." Execution requires some planning and coordination of resources and personnel. While things change, they hardly move at the speed of light (the way that industry experts can sometimes suggest).

69 See Batey, M., & Furnham, A. (2006). Creativity, intelligence, and personality: A Critical review of the scattered literature, in *Genetic, Social, and General Psychology Monographs 132*(4): http://www.ncbi.nlm.nih.gov/pubmed/18341234

70 See Mumford, M. D., & Gustafson, S. B. (1988). Creativity syndrome: Integration, application, and innovation, in *Psychological Bulletin 103*(1): http://psycnet.apa.org/buy/1988-10128-001

Planning isn't dead. But it *is* comprised of some short cycles (product innovations) and some longer cycles (for social/cultural innovation), depending on your objectives and key results.

Try, learn, modify: A final word

The "Try, Learn, Modify" cycle of innovation Jim Whitehurst advances shares similarities with commonly studied phases of creative processes, and leaders can adopt those processes to improve innovation in their organizations. While the "Try, Learn, Modify" activities are process-centric, the influences surrounding them—like the mindset and culture of the organization, and individual associates' creative abilities—are significant contributors to the specific implementation of the "Try, Learn, Modify" initiative (as well as its outcomes). There is no "one-size-fits-all" solution to the problem of "having a more creative organization" or of "being more creative"; different organizations and individuals will have different experiences based on a variety of influences. Risk tolerance and open organization values are just a few of the influences that could positively benefit creative individuals and the way they engage with their work—but they are among the most critical.

Heidi Hess von Ludewig researches networked workplace creativity from the systems perspective, which means that she examines the relationships of multiple elements within the workplace that influence how individuals and groups perform innovative and creative work. She spent over fifteen years in the software industry performing a variety of roles, from developer to analyst, for Fortune 500 companies before receiving her PhD from North Carolina State University in 2014. Her research informs the work she does day-to-day, and she is happy to report she recently started a new role at Red Hat, interlocking teams across the Customer Experience and Engagement organization.

Becoming a leader with inclusive awareness

Irupé Niveyro

Picture yourself as an artist. Imagine your creative process. You begin with a blank piece of paper before you. You visualize your work, then set out to materialize it in colors.

In the mist of your enthusiastic activity, artists walk into your studio and add to the process. They've come to collaborate, to add to your work in a constructive way. They add some strokes, some colors. They might even modify the essence of what you had started with.

How would that make you feel?

Close your eyes and be honest. What you are feeling might approximate your natural or learned tendency for inclusivity and collaboration.

If you were the artist arriving unexpectedly to collaborate on someone else's work, how would *that* make you feel? And would you take that into account during the collaboration?

This is an observation exercise I undertook some years ago, and it was enlightening for me. I became clearly conscious of the fact that I *was not* receptive of contributions that did not align with an image or plan I had in mind.

And I was surprised to find people and groups next to me that *were* happy with the unexpected results! They'd actually enjoyed the different contributions and had the capacity to welcome the differences and build on them with deeply open attitude—with curiosity and eyes filled with wonder.

Their joy was inspiring. Could I develop that capacity too? Could anyone do it? Who would *want* to do it?

That insight and the questions it sparked burned in me—and opened many more questions and paths. After this experience, I felt an important twist in my approach to work, life, processes, and relationships. It helped me develop a concept I've been elaborating and would like to share in this chapter: inclusive awareness.

An ability to be open

As individuals, as teams, as organizations, and as a society, we face challenges that cannot be *understood* much less *solved* by any one particular actor working at any level. We're seeing situations that most of us don't want—situations that definitely don't work. And yet there they are. You name it: climate change, terrorism, violence, poverty, depression. Tackling these issues in our everyday work requires help from others.

But most of us have been raised and live in a way that emphasizes *individual* effort and results over *collective* action. When we do appeal to concepts like "team" and "teamwork," we think of them as something *external*, something *subsequent to* individual actions. Individuals with different, competing ideas "agree on" a course of action and "add to" each other's ideas, abilities, strengths, etc. We rarely think about beginning with the collective. We think in terms of individual *emotions, wills,* and *intentions*, and when we try to shift our thinking . . . well, it gets a bit fuzzy.

Luckily, organizations and communities are starting to open up, looking at situations in a more collaborative way. As a result, they're developing inclusive awareness.

"Inclusive awareness" refers to the capability that surprised me so much: the ability to be *open* to different contributions and to differences in thought, emotion, or action from the people in one's environment. Applied to leadership, it refers to a leader's ability to creates spaces in which exploration is safe and worthwhile, where different views and perspectives can intersect, where a common purpose is clear, and where collaborative solutions for significant challenges can be built.

It requires not only an open *mind*, but also an open *heart* and an open *will*.

Mind—heart—will

Let's try to clarify a bit.

Generally, we relate to one another at a logical, rational level —the realm of thought and mind. We can be relating with either an "I know that already" prejudice, or from an open attitude of curiosity: "Wow, look at that! I want to know more about it." The second approach is what I'd call having an open *mind*.

Our feelings and emotions are also part of the way in which we relate. We might have an attitude of fear or anger related to what we are sharing with someone. Or we might experience a great deal of compassion towards someone or something: "I connect to what you feel. I am OK with it. Thank you for sharing." The second approach is what I'd call having an open *heart*.

Every once in a while, we reach a state of communion, a place where the relationship stands connected with something larger than us—larger than "me" and larger than "you." We might let that relationship transform us, transform the conversation, and transform the motivations we bring to a project, idea, or work. Often this state and attitude reflect on who we're interacting with, and it in turn transforms them. The results of the interaction are completely innovative and unexpected.[71] The courage to let that communion transform us is what I'd call an open *will*.

These three shifts in attitude are key to developing inclusive awareness, which enables others to bring their entire selves—their thoughts, their emotions, and their intentions—into a situation. And it is the quality we need to develop in open leaders if we wish to inspire and convene the talent we need in our teams.

71 http://www.dailygood.org/story/450/uncovering-the-blind-spot-of-leadership-c-otto-scharmer

Opening up

So, as a leader (or an artist), why would you adopt inclusive awareness?

If you've experienced the joy of the creating something in an open way, this might be a reason powerful enough to develop inclusive awareness. This was my case after seeing it in others. In fact, open values such as collaboration, adaptability, or community cannot exist without this base value of inclusivity (see Appendix)

Additionally, though, inclusive awareness can have an enormous impact on the way a team operates, the commitments the team members have, and the outputs the team produces.

Team members that have achieved inclusive awareness are involved deeply in what they do and the organizations they collaborate with; they can express and develop their full potential. This is a differentiator organizations and leaders need to work on as they seek to attract and retain the talent necessary for evolving and surviving these days.

And what about the nature of the work itself? If the success of your project depends on the profound combination of talents committed to its purpose, if the expectations are high, if you don't have a clear path forward or way to solve multiples issues and challenges arising, if you're facing volatility and uncertainty and complexity and ambiguity, then you and your team members will need this capability. Building teams that are more and more agile is becoming necessary for specific projects, and adopting inclusive awareness will enable you to build teams that have a clarity of purpose the talents needed for that project.

The good news is that, once initiated, inclusive awareness reinforces creative relationships that invite others to develop this same ability. And a team working on this level of deep collaboration, built on inclusivity as described, will be able to face challenges and find solutions that would otherwise be unimaginable.

Inner condition

Inclusive awareness starts with self-awareness—awareness of who we are, of the projects we choose to lead or join, of our purposes and the talents we possess, and of our needs and our own limits. In other words, awareness of our inner condition as it evolves.

Our inner condition, the internal dimension from which we operate, normally goes unnoticed. Nevertheless, it determines the quality and effectiveness of what we do. If we are to develop inclusive awareness, then we need to identify and observe this inner condition from which we operate, individually and in our teams. Once *identified* and *observed*, we can *influence* and *develop* it.

Of course, there needs to be an interest, a conviction, or a *need* for the change (as with any change!). We need discipline, and feedback from the team might be helpful. But primarily we need constant observation of our own self, our thoughts, emotions and reactions.

Listening

One method for observing our inner condition lies in the way we listen. We practice listening about 16 hours every day. Try and observe at what level you are listening during this time:

1. **Superficial listening:** paying attention to what you already know and re-confirming it
2. **Factual listening:** noticing new data that's different from what you expect to see; looking with an "open mind"
3. **Empathic listening:** connecting with the perception of another person, with an emotional connection (an "open heart"); a shift occurs in the inner condition and we are able to see form the another person's eyes
4. **Generative listening:** connecting with our capacity to let go of our original intention and to welcome the best of future possibilities (from who we are and who we want to be), with an "open will"; a new, deep shift occurs in our inner condition and our "self-awareness"

becomes more inclusive and can be transformed by what is emerging

Start with an initial assessment of your level of listening during a day and register shifts upward or downward. What attitude or which level of listening are you in most of the time? How do they distribute during your day? Extend your observation over a week. Which level of listening do you need to operate from, given who you are, who you want to be, your purpose, and your current challenges?

Once you start observing the way you listen (your inner condition), you might notice that shifts from one level to another modify your mental state, your present emotions, and what you feel in your body.

Developed and sustained over time, this feeling becomes an *inclusive awareness* that creates a different environment for your team and enables deep collaboration and successful innovation.

Irupé Niveyro enjoys helping others tune into their purposes and develop them. After a successful 20 years in IT and consulting, she transformed her mediation and negotiation skills into a facilitating and development firm, I+D, which helps organizations and teams achieve their results in an effective and harmonious manner.

Part 3:
Motivation & Engagement

Let engagement lead the way

Chad Sansing

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

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

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

That's the core belief of the Open Leadership and Events (OLE) team at the Mozilla Foundation. In our work to spread the principles, practices, and skills of open leadership, we aim to design and build programs that empower participants to take the lead on open projects about data, internet health,[72] and the impact those things have on both their local and distributed communities. We serve leaders from around the world and across a wide range of open, for-profit and non-profit, and technical and non-technical projects.

Participants in OLE programs come from all over the open ecosystem; they include people working on open data, open educational resources (OER), open government, open hardware, open science, open software (F/OSS), privacy and security for open practitioners, and more. For example, in 2018, Mozilla's Global Sprint (a 2-

72 https://internethealthreport.org/

day marathon of contribution to open projects) included projects and communities like these:

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

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

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

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

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

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

Project DNA

Our MoE drew inspiration from the Total Engagement Index (TEI). In 2017, the advocacy team at the Mozilla Foundation developed the TEI and its dashboard in order to track how people on our mailing list interacted with emails and other campaign channels. Vojtech Sedlak and Brett Gaylor led the work at Mozilla in consultation with Harmony Labs. The MoE is also an extension of the well-known pyramid of engagement developed by Groundwire.[73]

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

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

1. **OWNING:** Actions taken by allied individuals and organizations to promote internet health, like launching their own internet health campaign or project
2. **LEADING:** Actions taken to partner with Mozilla on internet health issues, like partnering on a campaign or event

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

3. **CONTRIBUTING:** Actions taken to support Mozilla's internet health work, like donations, project contributions, and amplifying Mozilla content on social media
4. **ENDORSING:** Actions taken to spread Mozilla's internet health work, like signing petitions and liking and sharing updates on social media
5. **OBSERVING:** Actions taken to learn about Mozilla's internet health work, like visiting a campaign website or opening a campaign email.

An **OBSERVING** engagement might have earned the team a fraction of a point, while each **LEADING** or **OWNING** might be worth a full point on its own. By totaling the scores of every engagement in a given month, the advocacy team could track an aggregate score representing its impact.

The TEI is no longer a primary inspiration for the foundation, but it gave the OLE team a framework for examining our own work and identifying the key forms of participation and engagement we want to track across our year-long cycle of leadership trainings and events from our Open Leaders program through the Global Sprint and MozFest. Our work also draws on research from Mozilla's Open Innovation team, which explores being "open by design" and fostering community interactions and value exchanges in open projects.[74] Other key elements of the MoE come from team members' experiences with open science initiatives, working open workshops, web literacy trainings, research done for the Open Leadership Framework,[75] and Mozilla's work to champion openness as an internet health issue.[76]

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

75 https://mzl.la/olf

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

Developing a Mountain of Engagement

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

To begin developing our MoE, first we asked: *What do we do?* We wanted to synthesize and capture a holistic view of our work taken from each team member's perspective to minimize the chance we'd overlook something important that we do, albeit infrequently or implicitly. We identified major programs like Open Leaders,[77] the Global Sprint,[78] open science mini-grants,[79] and MozFest,[80] as well as less visible pieces of work like developing curriculum, maintaining a social media presence, researching open leadership practices, and speaking at conferences.

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

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

1. **Leading:** A high-touch relationship; we maintain relationships and co-branded events and trainings with

77 http://mzl.la/openleaders/

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

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

80 http://mzl.la/mozfest

alumni and allies to increase the impact, prestige, and reach of both parties' work.

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

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

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

Figure 1
The OLE team's MoE, CC BY 4.0 by Mozilla

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

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

Figure 2
Summary chart of the draft OLE MoE, CC BY 4.0 by Mozilla

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

We wanted to know:

- What works and what doesn't work for different groups of participants.
- How participants move from one engagement to another or get stuck between them.
- How we might systematize the ways we recognize participants and invite them to deeper levels of engagement with us over the lifetime of our relationship with them.

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

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

By giving them most of our attention and support, we can empower them to co-create programming with us and then launch their own communities, organizations, and projects in support of internet health.

And that is where we are today.

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

While you and your community, organization, and project might be more concerned with another part of the open ecosystem—

such as data, government, or software—we hope that this process (and the questions it raises) will help you understand when, where, and how to empower your participants to broaden and deepen their engagement with you and the interests you share.

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

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

Early experiments

First, a quick note on data: you should follow all the laws, policies, and rules that cover data collection, retention, and use for you and your participants. We always encourage people to adopt data privacy policies that are as strong as Mozilla's.[81]

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

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

- 65% came from outside the United States (US) and a "virtual" participant group (for which we have not geographic data).

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

- 61% completed an engagement at the Participating level of our MoE.
- 61% participated in the 2018 Global Sprint.
- 6% participated in cohort 5 of our Open Leaders program.
- 5% participated in our open science mini-grant application process.

Engagement data like this can lead us towards:

- Confirming or correcting our ratio of participants from the US and from outside the US so we can sustain or develop inclusive, global participation from diverse communities in our programming. We can also shift strategic focus to look at engagement from groups within the US whom we have not yet effectively or sufficiently invited and welcomed into these programs.
- Confirming or correcting our ratio of **PARTICIPATING** engagements and engagements at other levels of the MoE to establish a baseline or benchmark for growth in **COLLABORATING** and **LEADING** engagements.
- Examining the similarities and differences between audiences and opportunities across programs to apply best practices, as well as audience-specific invitations, to all of our trainings and events.
- Investigating why discrete projects—like developing the Open Leadership Framework— engage far fewer participants than on-going programs do.

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

- 6% of total participants engaged with 2 or more OLE programs at the **PARTICIPATING** level or higher in H1 of 2018.
- 71% of these participants came from outside the US.
- 76% participated in the 2018 Global Sprint.

- 53% participated in cohort 5 of our Open Leaders program.
- 17% participated in our open science mini-grant application process.
- 4% participated in all 3 programs.
- 54% participated in the Global Sprint and Open Leaders.
- 7% participated in the Global Sprint and open science mini-grant application process.
- 1% participated in Open Leaders and the open science mini-grant application process.

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

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

A story of engagement

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

However, by paying attention to that pathway of engagement in OLE programming between **PARTICIPATING** (being a mentee) and **COLLABORATING** (becoming a mentor) on the MoE, we were able to

identify this problem quickly and work to keep more participants engaged between rounds 3 and 4. By adding additional mentor training as a form of professional development and support for returning participants, we brought the percentage of past participants willing to stay on as collaborators back up to 72%. However, as we continued to develop and grow the program, that number dropped back down to 50% when we looked at participants from cohort 5 who returned as mentors for cohort 6.

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

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

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

Next steps

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

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

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

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When empowering employee decision-making, intent is everything

Ron McFarland

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

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

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

Managers should stay involved in critical decision-making, even as they grant their front-line employees a bigger voice in deci-

sions. 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 discus-

sions 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.

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The Tao of project management

Allison Matlack

The Tao Te Ching,[82] believed to have been written[83] by the sage Lao Tzu[84] 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*, 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).

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*.

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

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

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

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.[85]

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 can teach you how to manage projects very well, and these are good skills to have.[86]

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.

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?

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

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

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.[87]

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 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.

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

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!"[88]

Rebecca Fernandez 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.[89]

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.

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.[90]

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.

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

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

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

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.

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.[91]

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[92] 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

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

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

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.

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.[93]

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,[94] or "continuous improvement." Don't be afraid to try and fail. Failing is the label we've put on the process of

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

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

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.[95]

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.

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

Leading through the power of "thank you"

Curtis A. Carver

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

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

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

Praise and progress in public

We call it Praise and Progress.

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

During this portion of the meeting, employees often take time to personally thank—in front of their peers—individuals who helped them and made an impact on their work. Sometimes, participants will thank people who aren't at the meeting: People on other teams or in other departments. When that happens, I send those folks

emails to let them know our team has recognized them, and I add my own personal thanks to the note. I also send a copy to their managers.

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

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

- Praise and Progress builds a culture of innovation. Every month, we're talking together about our successes and new projects, and that fosters both a sense of forward movement and a spirit of accomplishment.
- The meetings build a culture of gratitude and teamwork within the company. As everyone becomes more comfortable with the Praise and Progress ritual, they open up more—and that culture of gratitude gets even more deeply entrenched.
- As a leader in the organization, I find Praise and Progress meetings extraordinarily educational because I not only hear teammates' perceptions of the projects they're working on but also often learn things I never even knew my organization was doing!
- Discussing our work publicly is a great way to foster transparency across the organization. Since we're sharing our successes and the stories of the challenges

that led to them, we can often help one another and lend immediate guidance.

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

Not about you

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

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

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

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More engaging meetings begin with trustful relationships

MaryJo Burchard

People tend to focus on the technical elements of meeting prep: setting the objective(s), making the agenda, choosing a place and duration, selecting stakeholders, articulating a timeline, and so on.[96] But if you want people to come to a meeting ready to fully engage, building trust is mission-critical, too. If you need people to engage in your meetings, then you're likely expecting people to come ready to share their creativity, problem-solving, and innovation ideas.

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

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

1. Are you for real?

Engagement begins with people's need for confidence. First and foremost, they're going to want to know that the meeting they are walking into will be exactly what you told them they'd be walking into. They want to be able to rely on and accept the accuracy of

96 See Angela Robertson's chapter in this volume.

your stated reason for the meeting, its objectives, etc., at face value, knowing that you are not intentionally attempting to deceive or trap anyone, nor are you withholding crucial information from them.

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

2. Are you safe?

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

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

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

3. Are you consistent?

One of the greatest gifts a leader or decision-maker can give to stakeholders is a clear sense of consistency. Consistency enables

people to obtain some level of clarity regarding the range of possibilities for any given meeting—and it helps them plan accordingly.

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

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

4. Can they depend on you?

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

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

5. Do you know your stuff?

Having the skill and expertise to conduct the meeting and discuss responsibilities isn't enough. You need to know your people. A meeting in which the leader is unfamiliar with the group's history, trigger words, social cues, behavioral norms, and shared values will make it very difficult to make sure you (and others!) are engaging in

alignment with cultural expectations. Perceived incompetence by the person leading a meeting can be an immediate engagement-killer.

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

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

6. Does the buck stop with you?

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

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

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

This is the linchpin of trust.

People can handle a lot of things—inconsistent or erratic behaviors, stupid verbal responses, lack of follow-through, even lack of knowledge or ownership—if they can sense that you are really trying to do right by them. It is worth the time to connect with people be-

yond what you need from them, to take a genuine interest in who they are as people and what's going on in their lives. Beyond being good interpersonal protocol, it's good business.

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

Bottom line

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

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

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

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Open leadership lessons from a galaxy far, far away

Jim Hall

No matter where you are in an organization, you can benefit from observing others and learning from them. We can *all* learn lessons from someone else.

I like to look for leadership lessons wherever I go. Sometimes I learn a few tips on public speaking by watching a skilled presenter. Or I'll learn how to improve my meeting management style by reflecting on meetings that go well.

But I also like to find leadership lessons from unlikely places. Several years ago, I started reflecting on the leadership lessons we can learn from certain television shows or movies. Specifically, I found myself thinking about the role and power of leadership during periods of great transition—following the events in *Return of the Jedi*.

I imagined myself as an outside observer at the film's conclusion. What would I think upon hearing that the Emperor had died during the Battle of Endor? And what advice would I give the next person to assume the mantle of supreme leader?

I began by considering the obvious next leader: Darth Vader, Lord of the Sith. Vader's leadership style is essentially the same as Emperor Palpatine's. Both prefer a top-down leadership approach, and neither are very inclined to make major changes to the way the Galactic Empire is structured or run. To them, what worked for the last twenty years would probably continue to work in the future. The only changes would be "bigger and better," such as building even larger Star Destroyers.

So as Vader presumably transitioned into his new leadership role, what advice would I give him?

Since Vader's leadership style is very similar to that of his predecessor, I would recommend that Vader meet with his management teams and communicate that everyone should "stay the course," and that nothing would change. By doing this, Vader sets an expectation with those below him that everyone can understand. In this first meeting, Vader would likely also set his expectations for the Empire, and identify any areas that might change from his predecessor. I expect that the rest of the Empire would get behind Vader as the new leader and generally support him in his transition.

But in the movie, Vader didn't become the new leader. Spoiler alert to those who haven't seen the film: the Rebellion wins the day. As a result, I think it's safe to assume that, if the film had continued, Princess Leia would have become the new supreme leader (and if you've seen the new sequels, you know that was pretty much the case).

I imagine Leia would also want to take the organization in a new direction. But Leia's leadership style is demonstrably quite different from that of Emperor Palpatine or Darth Vader. Rather than leveraging a top-down directed-leadership approach, Leia typically sets the context for people to do their best and collaborate. You might say that Leia prefers *an open organization model*.

With such a contrasting style, what advice would I offer Leia as she makes her leadership transition?

My advice would be for Leia to embrace the open organization culture. As we've seen in the various Star Wars films, while the organizational structure of the Rebellion was quasi-military, it was also rather *open*. Members shared information freely, and they worked toward a shared, clearly-defined vision—sometimes ignoring typical organizational norms as people from different parts of the organization came together to meet common goals.

Stepping into the leadership role of an open organization, Leia should meet with the senior leaders as early as possible and explain her vision. In this meeting, she would define her goals and work col-

laboratively with that team to establish priorities to drive the first one hundred days. Most importantly, Leia should discuss any broad themes for major changes. By communicating early and often as she takes on the new leadership role, Leia sets and reinforces expectations with those around her. As a result, I expect that her transition would be ultimately successful.

Compare the two leadership transitions: My advice for Darth Vader's top-down transition is to communicate broadly and share goals. Similarly, my leadership advice for Princess Leia's open organization transition is to communicate frequently and set goals. Despite very different leadership styles, my recommendations for effective leadership transition are basically the same; the results, of each approach, however, might be dramatically different.

Apply this leadership lesson to your next transition. No matter where you are in the organization, and no matter your leadership style, your leadership transition remains the same. Communicate with those around you, set goals, and clarify priorities. Identify any planned changes as early as possible in your transition, share updates frequently, and the Force will be with you.

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Appendix:
The Open Organization Definition

The Open Organization Definition

The Open Organization Ambassadors

Preamble

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

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

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

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

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

Characteristics of an open organization

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

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

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

Transparency

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

- Everyone working on a project or initiative has access to all pertinent materials by default.
- People willingly disclose their work, invite participation on projects before those projects are complete and/or "final," and respond positively to request for additional details.
- People affected by decisions can access and review the processes and arguments that lead to those decisions, and they can comment on and respond to them.

- Leaders encourage others to tell stories about both their failures and their successes without fear of repercussion; associates are forthcoming about both.
- People value both success and failures for the lessons they provide.
- Goals are public and explicit, and people working on projects clearly indicate roles and responsibilities to enhance accountability.

Inclusivity

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

- Technical channels and social norms for encouraging diverse points of view are well-established and obvious.
- Protocols and procedures for participation are clear, widely available, and acknowledged, allowing for constructive inclusion of diverse perspectives.
- The organization features multiple channels and/or methods for receiving feedback in order to accommodate people's preferences.
- Leaders regularly assess and respond to feedback they receive, and cultivate a culture that encourages frequent dialog regarding this feedback.
- Leaders are conscious of voices not present in dialog and actively seek to include or incorporate them.
- People feel a duty to voice opinions on issues relevant to their work or about which they are passionate.

- People work transparently and share materials via common standards and/or agreed-upon platforms that do not prevent others from accessing or modifying them.

Adaptability

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

In open organizations, adaptability looks like:

- Feedback mechanisms are accessible both to members of the organization and to outside members, who can offer suggestions.
- Feedback mechanisms allow and encourage peers to assist one another without managerial oversight, if necessary.
- Leaders work to ensure that feedback loops genuinely and materially impact the ways people in the organization operate.
- Processes for collective problem solving, collaborative decision making, and continuous learning are in place, and the organization rewards both personal and team learning to reinforce a growth mindset.
- People tend to understand the context for the changes they're making or experiencing.
- People are not afraid to make mistakes, yet projects and teams are comfortable adapting their pre-existing work to project-specific contexts in order to avoid repeated failures.

Collaboration

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

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

Community

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

- Shared values and principles that inform decision-making and assessment processes are clear and obvious to members.

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

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

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