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Version 1.0

Also in the series

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

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

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

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

Contents

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Appendix

Learn More

Introduction:
Title of it goes here

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Part 1: Cultures

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Organizational learning: A new perspective on DevOps

Gene Kim

In the DevOps community, we talk a lot about automated deployments, doing multiple deployments per day, and the need for culture. I want to share with you something that isn't talked about nearly as widely, but I think is just as important: the benefits of organizational learning.

Let’s take a moment to visualize what an organization that has fully adopted DevOps principles and practices might look like.

We are able to accommodate a high rate of change that allows us to satisfy our organization and out-experiment our competition. Our changes have short lead times, and we can make changes and deploy code at any time of the day (as opposed to only on Friday at midnight), without organization-paralyzing fear that it will cause massive chaos and disruption.

Furthermore, our code and environments are safe to change (and we can recover from mistakes quickly), ideally without even impacting the customer. We have created a high-trust environment where we can rely on our team members throughout the entire value stream, knowing that we are all working together to help the organization win.

When bad things happen—which entropy and Murphy’s Law ensure—we have sufficient monitoring in place to quickly

find out what is going wrong, restore service, and resume normal operations. Because we have a culture of relentless improvement, we will figure out how to prevent it from happening again in the future, or if we can't, at least enable quicker detection and recovery.

And because we know that more important than daily work is the *improvement* of daily work, we are constantly learning as an organization, and turning local discoveries into global improvements.

In his book, *The Fifth Discipline*, Peter Senge explains that "knowledge exists at the edges, not at the center," and that we need organizational learning because it enables helping our customers, ensures quality, creates competitive advantage and an energized and committed workforce, and it uncovers the truth.

Therefore we must create a culture that rewards learning, which often comes from failure. Moreover, we must ensure that what we learn becomes embedded into our institutional memory so that future occurrences are prevented.

Encourage and celebrate learnings

No amount of command and control management can direct workers to fix each strand, one by one. Instead, we must create the organizational culture and norms so that everyone finds and fixes broken strands, all the time, as part of our daily work.

Our goal should be to maximize our organizational learnings from any accident, gain the best understanding of how the accident occurred, and empower everyone to create the most effective countermeasure to prevent it from happening again, or enable quicker detection and recovery. In addition, we must foster a culture where the entire organization learns from it, so

that any local improvements can be turned into global improvements.

Intuit has a famous monthly ritual where the CEO of the company gives a ceremonial life preserver to the person who made the largest mistake. The recipient signs the life preserver, then tells the entire company what happened and what they can learn from it.

Make it easier to use standards than not

Standards, encompassing the sum of our organizational knowledge, should be easier to use than to not. One of the best places to put this knowledge is into a centralized source code repository that is shared throughout the organization, allowing the ability to quickly propagate knowledge. Some other characteristics of successful standards include:

- Shared source code repository and thorough documentation that can be searched and widely reused
- Internal discussion groups for each library and service (e.g. “github-users” or “puppet-users”); often people having questions will get responses from other users faster than from the developers
- Widely broadcasted, blameless postmortem reports

Justin Arbuckle, former chief architect of GE Capital once said, “The best architecture document is one that is implemented in code, in a shared source code repository, that anyone can pull from.”

Enable the organization to discover its way to greatness

By valuing learning, we create an organization where we no longer expect leaders to plan our way to greatness. Instead, leaders help foster and develop routines, test them in practice,

recognize which don't work, and reinforce those that do. Leaders do this by reinforcing the value of learning and ensure that obstacles are removed so that whatever got in our way yesterday and today won't get in our way tomorrow.

What does organizational learning look like in a real DevOps journey?

I recently had a chance to hear about it from Jim Stoneham, CEO of Opsmatic. In 2009, he was the general manager of the Yahoo! Communities business unit, which Flickr became a part of. Stoneham shared:

> "The amount of our organizational learning went through the roof as we increased our deployment frequency at Yahoo! Answers from once every six weeks to multiple times per week. Suddenly, we were able to able to try things out and experiment in ways we hadn't been able to do before. Our team became very much in tune with the numbers: we'd would look at them as a team on a daily and weekly basis, and use that to inform feature conversations and plans.
>
> Instead of engineers talking about the product once every six weeks, we'd be talking about it daily. This was exactly the learning that we needed to win in the marketplace—and it changed more than our feature velocity. We transformed from a team of employees to a team of owners. When you move at that speed, and are looking at the numbers and the results daily, your investment level radically changes. This just can't happen in teams that re-

> lease quarterly, and it’s difficult even with monthly cycles."

I love how Jim Stoneham talks about the benefits about DevOps that sound very different than how we often talk about it as Dev or Ops. It's this capability of creating organizational learning that enables us to win in the marketplace.

Gene Kim is a multiple award winning CTO, and researcher. He was founder and CTO of Tripwire for 13 years, and is an author of both The Phoenix Project *and* The DevOps Handbook.

Innovation requires new approaches to feedback and failure

Jim Whitehurst

"Organizational culture" is something plenty of people are puzzling over today, and with good reason. More and more leaders are realizing that the culture permeating and guiding their organizations will determine whether they succeed or fail.

The term “organizational culture” refers to an alignment between two forces inside an organization: values and behaviors. Aligning those forces productively is one of the most difficult and important tasks facing leaders today.

Customers and partners routinely tell me they want to create a "culture of innovation" in their organizations. By this, they usually mean that they want to create contexts where certain actions—those that generate new and unforeseen sources of value capable of fueling growth—are not only expected but also commonplace.

I certainly understand why. Today, a culture of innovation is a strong indicator of an organization's ability to weather the kinds of constant disruption nearly every industry seems to be experiencing. But creating one is easier said than done.

Here's how I'd recommend an organization approach that challenge.

A new method

One method for creating a culture of innovation involves focusing on how your organization treats both *feedback* and *failure*.

In innovative organizations, feedback is continual and frank—in other words, it's open. Dialogue about ideas associates raise must be ongoing, constructive, and, above all, honest.

To foster innovative environments, leaders must model the kinds of feedback behaviors they want to see in their teammates and associates. They need to be open to even the most difficult conversations.

Innovation is one product of creativity. Despite the way we tend to think about it on most days, creativity is *very difficult*; it's the product of intense collaboration and sharing. Actually, Ed Catmull and Amy Wallace discuss creativity this way in their book *Creativity, Inc.* Innovative teams and organizations, they say, must have some way to simply separate the wheat from the chaff—to simply call a bad idea a bad idea—and move forward. Creating a culture of respectful, frank disagreement is key to this. The opposite of this kind of culture is one where feedback is a rarity—or, worse, where it's only positive (as I wrote in *The Open Organization*, it's possible for organizations to be "terminally nice").

One of the things people receive feedback about is their failures. But cultures of innovation take a specific approach to failure: They celebrate it.

Without question, being innovative involves taking calculated risks. People in innovative organizations must feel like they can try something novel and unexpected without fear of intense, negative blowback—otherwise, they'll never attempt anything new.

Traditionally, we've treated failure as a sign of personal failing: Someone faced with a tough choice didn't make the "right" decisions, so we need to punish the behavior that led to a certain outcome.

But in cultures of innovation, where everyone is expected to experiment, how can anyone possibly know what the "right" and "wrong" decisions will be if the problem is so new that few people have any concrete experience with it?

Instead, I like to think about failure the way Jeff Bezos once described it in a letter to Amazon shareholders[3]. He said:

> Most large organizations embrace the idea of invention, but are not willing to suffer the string of failed experiments necessary to get there . . . Given a ten percent chance of a 100 times payoff, you should take that bet every time. But you're still going to be wrong nine times out of ten. We all know that if you swing for the fences, you're going to strike out a lot, but you're also going to hit some home runs.

The trick to making this approach to failure an organization's *default* approach is changing the way we think about evaluation.

Traditional management is management by objective. It examines *outcomes* to see if they've aligned with expectations someone set out *before* undertaking a task. If these don't align, then someone, somewhere, has failed—and that's a bad thing.

In innovative cultures, however, we need to balance that approach with one that actually rewards failure. Leaders must be able to encourage certain *motivations*, which are a key source of innovation. They're not as overt or quantifiable as out-

3 https://www.sec.gov/Archives/edgar/data/1018724/000119312516530910/d168744dex991.htm

comes, however, which is why traditional management theory struggles to account for them.

How can leaders assess people who might have failed, but who've demonstrated exciting new ideas and approaches along the way? And how can they encourage others to actually emulate those people?

If you can get there, you'll know you have a culture that rewards risk-taking.

A focus on structure

This approach to creating a culture of innovation isn't a foolproof and complete plan for changing the way your organization functions today. I don't think such a comprehensive plan actually exists (if it does, please let me know!).

But I do believe that focusing on the organizational structures that govern approaches to feedback and failure is a promising way to begin—much better, anyway, than simply telling people to "be more innovative."

Jim Whitehurst is President and Chief Executive Officer of Red Hat, the world's leading provider of open source enterprise IT products and services.

Why a Buffer developer open sourced his code

Jordan Morgan

If you look for the official definition of open source, you'll likely stumble upon this outline[4] from the board members of the Open Source Initiative. If you skim through it, you're sure to find some idea or concept that you feel very aligned with. At its heart, openness (and open source) is about free distribution—putting your work out there for others to use.

It's really about helping others and giving back.

When we started to think about open source and how we could implement it at Buffer, the fit seemed not only natural, but crucial to how we operate. In fact, it seemed that in a lot of ways we'd be doing ourselves a disservice if we didn't start to look more seriously at it.

But what I didn't quite realize at the time were all the effects that open source would have on me.

Open source has positively impacted me as a developer, as an employee at Buffer, and even as a person. Those are the things I'd love to share with you here—to show you how we stumbled upon open source at Buffer.

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4 https://opensource.org/osd-annotated

Acting on your values

At Buffer, we're known just as much for the way we operate as much as our product. We believe that making your values and culture wildly transparent gives you an extra sense of responsibility to act on them. As someone who works at Buffer, I often wonder how I can be a good steward of what we're all about. How can I promote our ideas, failures, successes and experience in a way that helps other people?

As a company, we value transparency and put a premium on it. We think it helps us operate, and we hope that other people can look at our data and derive real, lasting value from it. That's why you can find all of our salaries[5] in a public Google Docs spreadsheet, open up a Trello board and see our product roadmap, or even go to a realtime dashboard showing all of our revenues.

After thinking about this one day, I came to realize that I wasn't fully taking advantage of perhaps the biggest opportunity Buffer was affording me to give back: our own code. I spend hours every day writing it, testing it, and thinking about it to make sure the work I do solves real problems for people, and generally makes their life easier or better.

So why wasn't I sharing it?

From the top down

I think values like this tend to flow from the top of organizations. Sharing the code you write daily for a company might be difficult if that company didn't feel the same way about the code! To that end, our CEO, Joel Gascoigne, seemed to sense this opportunity, and was also passionate about it. I remember

5 https://opensource.com/open-organization/16/3/social-startup-buffer-transparency-reigns

reading an email thread he started a month or two ago, where he raised some strong points in favor of using open source at Buffer.

Here is some of what Joel had mentioned:

> "I'd love to share something that's been on my mind for several years at Buffer. As you all know, one of our values is to Show Gratitude. Since the very beginning, we've been super fortunate to be building Buffer in a time where open source is a big part of the world of software development.
>
> There's no way that we'd be as big as we are today without open source. In fact, we probably wouldn't even be here at all. The internet is very much built on the generosity of those who lead and contribute to open source. We are quite literally standing on the shoulders of giants, and in many ways, what we've done ourselves is minute in comparison to the incredible technologies we're lucky enough to rely on and make use of.
>
> I believe that contributing more towards open source as a company is a key part of our future, and almost a duty we have. With our value of transparency, I think it's something people likely expect and should expect from us."

Once I read that, I felt reaffirmed. Getting involved with the open source community felt exactly like the right thing to do for Buffer.

Buffer's CTO, Sunil Sadasivan, is also a passionate open source champion. Sunil has the best "big picture" of engineering

at Buffer, and was quick to help us get open source initiatives moving at Buffer.

Recognizing the power of open source, Sunil helped us facilitate many important things—from a Slack channel specifically for open discussions, to an open calendar for suggestions, and a habit of leaving comments on our open source documents. Sunil was on board and helping us push forward.

When the CTO takes time to provide a larger vision for open thinking in a company, developers like me can more easily act on it. It's a symbiotic relationship, and it takes several of us to execute on the vision we have for open source. And seeing our leadership promoting our open source efforts really was amazing.

Committing to open source was a gut check for all of us. We knew we could be doing better here! Our values tend to promote personal growth, gratitude, and openness. By the same token, the open source community also advocates a lot of the same ideas.

It felt like a perfect fit for our workplace and culture.

Personal growth

At that point, I started to think about how I could help. With so much code and opportunity, I realized the challenge really lied within finding the right things to share. I came to the realization that, first and foremost, open source code should help someone. So what is most helpful?

We could, of course, open source the entirety of Buffer. That would certainly hold true to our values, but it also may not be the most beneficial move for the community. It seemed like the right choice to get started with the open source movement at Buffer would be to release some focused and individualized components.

As an iOS developer at Buffer, I'm most familiar with our iOS codebase. It's what I know best, so I started there. Around this time, I'd been working on a modular component to view images easily within our app. It was easy to use and solved a real problem that developers on the platform that developers often face. It felt like the perfect place to start.

Eventually it was. But first, I experienced an open source reality check: This was code that I wrote, and I didn't write it thinking that the world would one day examine it. Imposter syndrome and doubt quickly crept in. I started asking myself:

- What if this isn't any good?
- What if there are some mistakes?
- What if people think I didn't write the best parts (it was based on an existing open source project)
- What if I missed important shortcuts, like using the right APIs?

In only a matter of hours, I experienced some important growth as an engineer. And that growth stemmed directly from two things:

- Working at a company who believed in us to share our code, and that it was the right thing to do
- Open sourcing that code to the world

Sometimes, developing with only your team is easiest. They know you, and they are likely quite familiar with your coding tendencies. There's much comfort there (as well there should be). Contrast that with coding for potentially thousands of people, and your mental state can quickly change from comfort to doubt.

I think this experience is an important one for software engineers to encounter. It made me realize that I had an incredible learning opportunity in front of me. As the old adage goes:

"Nobody bats 1.000." There were bound to be mistakes or rough edges, and that was completely okay. So, I shared the code[6].

Showing gratitude

That experience directly correlates with the second benefit I derived from open thinking: gratitude. When I posted the open source project I previously mentioned, community reception was very positive. Other developers mentioned some tweaks, made some edits to our README file—and most of all, they were just thankful we released it!

This was such an important reminder of how much developing is a community driven task. No single developer has all the answers. There are experts, but I've constantly seen those experts point to the fact that the community helped them get where they are.

Open source helps other developers work and accomplish great things, but inherently it's also an act of knowledge transfer. I remember when Apple made Swift open source. It was an exciting day for me. I was elated to look through Apple's code and learn from the industry experts on the language. I picked things up that I may not have otherwise, and learned a lot of what best practices were.

In short, I was very grateful for that!

Beginning a journey

With open source at Buffer, we are very much in our infancy. We're still asking some questions to help put us on the right path, things like "What is the most helpful code to open source?" "How do we tell people about it?" and "How do we develop with an open source mindset?"

6 https://github.com/bufferapp/buffer-ios-image-viewer

Throughout the process, though, we've constantly been reminded that the internet is actually a very sharing and generous place. As Joel said, we are only where we are today at Buffer because of the brilliant code of other developers who were kind enough to share their hard work with the world. And what an amazing bar they've set.

All I can think about is how I want us to be like that. We want to learn from those people who are doing it so much better than us, and we'll strive to hit that high bar. We want to give back and help solve problems, too. We want to save other people time. We want to share all of our work in the open.

That's what lead us to open source, and it's already had an incredible impact on the way we think about work and culture. I'm excited to see where it takes us next.

Jordan Morgan is an iOS developer at Buffer. He is from Ozark and also founded Dreaming In Binary. He is focused on helping the community, creating things that inspire others, doing talks over iOS, and constantly being a student of any form of software engineering.

What engineers and marketers can learn from each other

Jackie Yeaney

After many years of practicing marketing in the B2B tech world, I think I've heard just about every misconception that engineers seem to have about marketers. Here are some of the more common:

- "Marketing is a waste of money that we should be putting into actual product development."
- "Those marketers just throw stuff against the wall and hope it sticks. Where's the discipline?"
- "Does anyone actually read this stuff?"
- "The best thing a marketer can tell me is how to unsubscribe, unfollow, and unfriend."

And here's my personal favorite:

"*Marketing is all fluff.*"

That last one is simply incorrect—but more than that, It's actually a major impediment to innovation in our organizations today.

Let me explain why.

Seeing my own reflection

I think these comments from engineers bother me so much because I see a bit of my former self in them.

You see, I was once as geeky as they come—and was proud of it. I hold a Bachelor's in electrical engineering from Rensselaer Polytechnic Institute, and began my professional career as an officer in the US Air Force during Desert Storm. There, I was in charge of developing and deploying a near real-time intelligence system that correlated several sources of data to create a picture of the battlefield.

After I left the Air Force, I planned to pursue a doctorate from MIT. But my Colonel convinced me to take a look at their business school. "Are you really going to be in a lab?" he asked me. "Are you going to teach at a university? Jackie, you are gifted at orchestrating complex activities. I think you really need to look at MIT Sloan."

So I took his advice, believing I could still enroll in a few tech courses at MIT. Taking a marketing course, however, would certainly have been a step too far—a total waste of time. I continued to bring my analytical skills to bear on any problem put in front of me.

Soon after, I became a management consultant at The Boston Consulting Group. Throughout my six years there, I consistently heard the same feedback: "Jackie, you're not visionary enough. You're not thinking outside the box. You assume your analysis is going to point you to the answer."

And of course, I agreed with them—because that's the way the world works, isn't it? What I realize now (and wish I'd discovered out far earlier) is that by taking this approach I was missing something pivotal: the open mind, the art, the emotion—the human and creative elements.

All this became much more apparent when I joined Delta Air Lines soon after September 11, 2001, and was asked to help lead consumer marketing. Marketing *definitely* wasn't my thing, but I was willing to help however they needed me to.

But suddenly, my rulebook for achieving familiar results was turned upside down. Thousands of people (both inside and outside the airline) were involved in this problem. Emotions were running high. I was facing problems that required different kinds of solutions, answers I couldn't reach simply by crunching numbers.

That's when I learned—and quickly, because we had much work to do if we were going to pull Delta back up to where it deserved to be—that marketing can be as much a strategic, problem-oriented and user-centered function as engineering is, even if these two camps don't immediately recognize it.

Two cultures

That "great divide" between engineering and marketing is deep indeed—so entrenched that it resembles what C.P. Snow once called the "two cultures" problem[7]. Scientifically minded engineers and artistically minded marketers tend to speak different languages, and they're acculturated to believe they value divergent things.

But the fact is that they're more similar than they might think. A recent study[8] from the University of Washington (co-sponsored by Microsoft, Google, and the National Science Foundation) identified "what makes a great software engineer," and (not surprisingly) the list of characteristics sounds like it could apply to great marketers, too. For example, the authors list traits like:

- Passion
- Open-mindedness

7 https://en.wikipedia.org/wiki/The_Two_Cultures#Implications_and_influence

8 https://faculty.washington.edu/ajko/papers/Li2015GreatEngineers.pdf

- Curiosity
- Cultivation of craft
- Ability to handle complexity

And these are just a few! Of course, not every characteristic on the list applies to marketers—but the Venn diagram connecting these "two cultures" is tighter than I believe most of us think. *Both* are striving to solve complex user and/or customer challenges. They just take a different approach to doing it.

Reading this list got me thinking: *What if these two personalities understood each other just a little bit more? Would there be power in that?*

You bet. I've seen it firsthand at Red Hat, where I'm surrounded by people I'd have quickly dismissed as "crazy creatives" during my early days. And I'd be willing to bet that a marketer has (at one time or another) looked at an engineer and thought, "Look at this data nerd. Can't see the forest beyond the trees."

I now understand the power of having both perspectives in the same room. And in reality, engineers and marketers are *both* working at the *intersection of customers, creativity, and analytics*. And if they could just learn to recognize the ways their personalities compliment each other, we could see tremendously positive results—results far more surprising and innovative than we'd see if we kept them isolated from one another.

Listening to the crazies (and the nerds)

Case in point: *The Open Organization*.

In my role at Red Hat I spent much of my day thinking about how to extend and amplify our brand—but never in a million years would I have thought to do it by asking our CEO to

write a book. That idea came from a cross-functional team of those "crazy creatives," a group of people I rely on to help me imagine new and innovative solutions to branding challenges.

When I heard the idea, I recognized it right away as a quintessentially Red Hat approach to our work: something that would be valuable to a community of practitioners, and something that helps spread the message of openness just a little farther. By prioritizing these two goals above all others, we'd reinforce Red Hat's position as a positive force in the open source world, a trusted expert ready to help customers navigate the turbulence of digital disruption.

Here's the clincher: *That's exactly the same spirit guiding Red Hat engineers tackling problems of code.* The group of Red Hatters urging me to help make *The Open Organization* a reality demonstrated one of the very same motivations as the programmers that make up our internal and external communities: a desire to share.

In the end, bringing *The Open Organization* to life required help from across the spectrum of skills—both the intensely analytic and the beautifully artistic. Everyone pitched in. The project only cemented my belief that engineers and marketers are more alike than different.

But it also reinforced something else: The realization that openness shows no bias, no preference for a culture of engineering or a culture of marketing. The idea of a more open world can inspire them both equally, and the passion it ignites ripples across the artificial boundaries we draw around our groups.

That hardly sounds like fluff to me.

Jackie Yeaney is Chief Marketing Officer at Ellucian. When she wrote this chapter, she was Executive Vice President of Marketing and Strategy for Red Hat.

[Chapter Review]

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Part 2: Skills

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How to strengthen your agile heartbeat with powerful retrospectives

Matt Thompson

If you work in an open organization for any length of time, you're likely to hear someone mention "sprints" or "heartbeats" at some point. Understanding these terms is simple: Take a big goal, then break it into small pieces that help you get there.

The practice derives from agile development and its various (funnily-named) flavors like "Scrum" and "Kanban," but the underlying logic is simple: Break big jobs into small time-bound sprints, then design a process and ritual for unpacking:

- what you accomplished in the last sprint
- what you learned from it
- what you're going to tackle in the next one

From "sprints" to "heartbeats," finding a healthy cadence

Many of us have found that replacing the word "sprint" with "heartbeat" is helpful for explaining the value to new colleagues. It implies a steady, *healthy* cadence or rhythm—as opposed to endless "sprinting" or panting against a series of arbitrary deadlines.

Heartbeats can create a great sense of purpose, and ebb and flow in your team. They can be set to any length—a week,

two weeks, a month. It's really just about bringing people together in a regular, predictable cycle, with a ritual and set of dance steps to ensure everyone's on the same page, headed in the right direction, and learning and accomplishing important things together. (As opposed to the "make it up as you go along" / gazillion emails and meetings / Bataan Death March of Multi-Tasking that gobbles up most projects by default.)

"Too busy to think"

A big reason people love working in heartbeats is that it makes work more *mindful*. It invites or even *forces* regular moments to step back, reflect, adjust your goals, and share real insights with colleagues that don't typically fit in the hurly burly of email and status updates. That process is generally called a "retrospective"—and lately I'm finding it to be the single most valuable parts of the process. Done right, it can help you work smarter instead of harder.

But: Retrospectives are also often the most neglected or easy part of the process to skip over—especially for time-starved teams already suffering from Too Many Meetings Syndrome. Here's why great retrospectives are one meeting you don't want to skip.

A regular ritual for reflection

A retrospective at the end of each heartbeat helps you unpack what you've accomplished and learned together, and where you might want to improve together in the next cycle. They can be dead simple; at the end of your heartbeat, just ask each team member to share:

1. What went well in the last heartbeat?
2. What could have gone better?
3. What do we want to improve in the next heartbeat?

Good retrospectives generate surprises

I find that when I'm part of a great retrospective, I leave the meeting feeling *surprised*. I leave knowing something I didn't know going in. I've had my perspective shifted in some way—particularly around what our *priorities* should be in the next heartbeat, or a key learning someone shares that helps me spot a new opportunity.

In particular, retrospectives can help to:

- **Re-prioritize** stuff that seemed urgent a week or month ago but doesn't anymore. That's great! Let's consciously de-prioritize or set it aside. By the same token: Little things that didn't *seem* important suddenly reveal themselves as highly leveraged in the week or month ahead, little keys or springboards that emerge out of the haystack.
- **Punt!** What can we push out to the next heartbeat, so that we can narrow our focus in this one? Retrospectives make you more conscious of *time* and the value of *phasing*. Not everything needs to be done all at once; it's liberating to push stuff out. If it's not on this train, it'll go on the next one.
- **Do less work!** Yes, I said it: Great retrospectives should help you do *less* work. Less work means faster, better work. Eliminate the clutter and distractions that grow like weeds around your team's feet; it's amazing how good that feels—and your teammates will love you for it.
- **Unpack learning.** You're learning great stuff as you go that you didn't know when you started the project. Retrospectives are a chance to share and write this stuff down. Without a regular ritual or invitation to do so, this usually slides to the bottom of everyone's to do list. But

these are valuable diamonds and nuggets you don't want to slip away.

- **Pull up.** Good retrospectives invite altitude adjustment. Go back to your original strategy / roadmap and remind yourself what you said was important. The stuff that actually *matters,* as opposed to just being "busy." How are we doing? How has our thinking changed? How do we re-connect our big picture goals to day-to-day tasks?
- **Re-energize.** Feel proud. Most of us walk around feeling guilty and stressed about how "behind" we are. Retrospectives remind the team that, no matter how imperfectly, you *really are* accomplishing and learning a lot together. You're not just hamsters on a treadmill.
- **Continuously improve.** Get better at getting better. Small improvements add up to powerful change over time, like compound interest. You don't have to move mountains; just feel the trust and momentum that builds after your team makes an agreement and actually sticks to it.

Bland retrospectives become boring status updates

On the flip side, *bad* retrospectives or heartbeat meetings start to feel like a waste of time. They become rote, and more like status updates, as opposed to really stepping back and doing some fresh thinking together. This becomes a vicious cycle; there's less and less value, so people start to question their purpose. Eventually someone says: "Should we just cancel these? We have too many meetings already."

Some common pitfalls:

- **Not enough time.** Everyone hates meetings, so it's easy to make heartbeat meetings too short to do real retrospectives. Or to just skip the retrospective piece al-

together. But, this should be the *one hour* every week or month you invest to save *dozens* or *hundreds* of misspent hours going forward!

- **Not enough trust.** People are afraid to say what they really think in front of colleagues or leaders. Or it becomes a defensive exercise to prove that everyone is "busy." Busy is the new bored.
- **Bad or no strategy.** When the strategy is bad or the goals are unclear, retrospectives can just end up exposing that fact over and over again. In a healthy project, that's good! It surfaces something you can fix. In an unhealthy one, it just repeatedly pokes the elephant in the room.
- **Agile without agile.** Every organization says it wants to be "agile" nowadays, but most don't mean it. You can't "do agile" without retrospectives, or some ritual for reprioritizing. It's like doing archery without the arrows.
- **Hopeless over-capacity.** Many organizations have no shared view of the work they've committed to doing. Consequently, they're hopelessly over-committed. They're drowning in work they'll never really get done, and have no meaningful way to prioritize. Working in heartbeats and doing real retrospectives can help; but only if they start to whittle down workloads. Otherwise, they just remind everyone how screwed you all are—and that's not fun.

Matt Thompson is the Director of Program Management at the Mozilla Foundation.

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Making open source fashionable

Lauri Apple

In March 2015, the leadership of Berlin-based Zalando gathered the company's entire tech team in a hip underground techno club (it's Berlin, after all) and announced a new way of working—something called "Radical Agility." Inspired by Daniel Pink's *Drive*, Brian Robertson's Holacracy system and the agile movement, Radical Agility emphasizes *Drive's* call for autonomy, mastery and purpose as the pillars of the company's tech strategy and culture. With this new framework, Zalando could more effectively evolve from e-tailer to online fashion platform; from top-down command-and-control to agile; from stagnant/uncool Java monolith to scalable and technically challenging microservices architecture that supports a polyglot approach to development.

As you might expect from such a substantial cultural transition, Radical Agility deeply transformed Zalando's open source development efforts. Until that point, our GitHub activity had been minimal: a few projects geared around PostgreSQL, a monitoring and alerting solution that had emerged during one of the company's annual Hack Weeks, and a few Python projects created by a prolific dev on the cloud team summed up the company's offerings. Radical Agility gave engineers the freedom and encouragement to choose and use the technologies—including open source—they felt were necessary and optimal to get the job done, or build their own software if none existed. The

adoption of technical Rules of Play[9] encouraging microservices, RESTful APIs, and use of cloud technologies like AWS freed them up to experiment. Many of our engineers felt this was the first time in their careers someone trusted them to make their own decisions.

Through the rest of 2015, dozens of new, informal technical guilds formed around specific programming languages, types of development, methodologies, AWS use, web dev, and other topics. Along with our head of platform/infrastructure engineering, I created a new Open Source Guild and, along with about 20 regular engineers showing up for our biweekly meetings, we crafted the first drafts of our "how to open source[10]" guidelines. These guidelines were pretty rudimentary in hindsight, but they covered the basics: which license to use (MIT), versioning, creating maintainers files, etc. We shared these guidelines with the rest of the organization and kept them as a living document, always subject to change as we learned more.

Meanwhile, the number of projects published on github.com/zalando soared into the hundreds. The enthusiasm our team showed for open source led the Guild to next develop a set of Open Source First principles to institutionalize this openness. These principles encourage our engineers to share their code instead of hide it inside private repos, as well as "take ownership," "be safe," "provide documentation," and "ask for help." The message reinforced the pillars of Radical Agility by encouraging mastery, team autonomy and end-to-end delivery of projects, and solid craftsmanship.

Naturally, transforming a culture takes a lot more than creating and publishing guidelines and principles. And getting

9 https://github.com/zalando/zalando-rules-of-play

10 https://github.com/zalando/zalando-howto-open-source

everyone up to speed can take some time when you're working with a rapidly growing, distributed organization undergoing a major organizational transformation. Pre-Radical Agility, many Zalando engineering teams had been working in a context in which they were expected to execute functional tasks, do whatever their lead/manager said, or both. This kind of culture might be good for delivery speed, but it doesn't encourage engineers to engage with the product they're building or solve problems independently. And our projects on GitHub reflected this. Members of the Open Source Guild who had cultivated a product mindset started to complain that the work we were sharing with the world often wasn't usable to anyone beyond our own walls.

A quick scan of our GitHub repos showed that quality varied. Some projects were out-of-the-box useful and had audiences of users or external contributors, but our overall output showed that we didn't reflect a coherent definition of what "open source" meant to our team. We already had used GitHub APIs and the talent of our monthly onboarding groups to generate a real-time metrics dashboard showing us which of our projects were most popular, and a few other data points. But a deeper dive revealed that many engineers published repos without READMEs, didn't invite contributions, and didn't clarify the "why" behind their work. Many projects were tightly dependent upon our own unique systems. And with so many projects to track, transparency and insight into what we were doing as a tech org—and why—was lacking. Despite growing our dev team exponentially (3x since Radical Agility's big reveal), our GitHub activity, now scattered across many different teams across the organization, still had no official overseer.

In January 2016, I became Zalando's open source evangelist and set about guiding our technology team toward a coherent, open source effective strategy. With 300+ projects

and always more on the way, where to begin? Among my first few tasks were to publish our how-to on GitHub and start raising internal awareness. A few weeks into the job, I went to FOSDEM and met other, more experienced Open Source Evangelists like Brandon Keepers of GitHub and Duane O'Brien of PayPal. These pros gave me some valuable feedback on how to encourage engineers to deliver maximum value in their open source efforts.

To understand what we were publishing on GitHub in a holistic way, I dug in and checked out each one of those 300+ projects on our GitHub repo. This review process took a few months, and revealed that we were releasing a lot of work that wasn't truly open source—i.e. out-of-the-box useful to the community at-large. With some guidance, we could turn that around. But doing that would take many one-on-one discussions with project creators. Luckily, I was in the perfect position to do this sort of communication, and set to work.

My process went like this:

- Check out a given repo on our GitHub org
- Assess the README for clarity of project purpose (what it did and how, why it did those things), setup/install directions, and other need-to-knows
- Ensure the project was actively maintained and included a maintainers file
- See if there was a contributing guidelines file, or any invitation for contributors at all
- Look for other Zalando dependencies
- Follow up with the project's maintainers and ask them what their goals were for their project, if they planned to add anything missing like README instructions or contributor guidelines, then begin helping them

Some projects we weren't maintaining or using at all—so I deleted those after getting the okay from the project creators (and, if need be, surveying the team to make sure we could delete without breaking anything). More often, we had released something useful only to ourselves; in those cases, the next step was either to pull back the repo and publish on GitHub Enterprise, or... or... or what? We definitely needed to reduce the signal-to-noise ratio on our GitHub org. We wanted to ensure that the strongest work rose to the top of our projects dashboard, and was most easily discoverable. However, the creators of many such projects really wanted their code to remain public.

The goal was to come up with a way for us to both respect their wish while making it more possible, as one veteran Zalando engineer put it, "to find the cool stuff."

The solution: create a new GitHub organization called the Incubator for storing those "coding in the open" projects, and use only the main Zalando GitHub org for "the cool stuff." After assuring our engineers that transferring GitHub repos from one org was possible and low-risk, I reached out to project creators and maintainers and worked with them to transfer their work. To help clarify why, we added a new section to our "how-to" explaining the difference between the main org and the Incubator, as well as which repos were appropriate only for GitHub Enterprise.

When GitHub notifications informed me that new projects had just come online, I'd check them out to see how out-of-the-box useful and polished they were. If the README wasn't clear that something was dependent on our own systems, or if there was no clear purpose detailed yet, I'd follow up immediately with the project creators to ask about their project vision. From 300+ projects on our main GitHub org, we're now down to 149 projects. Now, more than ever, the collection of projects we

highlight to the public emphasizes usability, good documentation, clarity of purpose, and "the cool stuff."

After refining our guidelines and processes, publishing them on GitHub, and sharing them in one-on-ones with any engineer who didn't know them, it took just a few months for our engineering team to adapt without any additional intervention required. Continuously clarifying the guidelines based on user feedback—i.e., developers' questions or points of confusion—helped with iteration, to ensure the guidelines were as clear as possible. And taking any opportunity to answer a question with "go to our guidelines for your answer!"—in HipChat forums, in one-on-ones, and in meetings—reinforced the message. I also integrated key parts of the how-to into my monthly open source presentation to our new hires, so that they would be aware of our processes and know where to find answers to their questions.

Over the past few months, the focus of my open source evangelism has shifted from grassroots awareness-raising and transferring repos around, to collaborating with project creators on promoting their great projects. The engineers behind Zappr, a GitHub integration that enhances workflow and enables teams to enforce repo requirements, evolved their project from a hack into an official GitHub integration. Patroni (a high-availability solution for PostgreSQL), and Connexion (API First Python Flask framework) have also developed into strong projects with external contributors, tech-media coverage, and community support. The devs do most of the hard work; I primarily show them where the doors of opportunity are open, and guide them across the threshold if they need any help.

The Guild's continued work has increased awareness of the ways we deliver open source products that the community can use. Guild members are key to driving and shaping the open

source culture inside our 100+ delivery teams in a democratic, practical way. We discuss projects, community management, licensing, industry trends, and other relevant topics on a biweekly basis, with a rolling agenda of topics the engineers propose. Colleagues who aren't located in our Berlin tech HQ join via Google Hangout. We pitch any changes to our how-to guidelines there, then document via Google Docs and share with Guild members at large (who now represent about 20% of our whole tech organization). We collect comments and challenge each other. Then, after about a week's worth of review and deliberation, we incorporate the new changes into the how-to. This way, our open-source culture remains grassroots and organic—that is, "Radically Agile."

Lauri Apple develops and evangelizes Zalando's open source efforts. She's also a producer/agile project manager for the company's core search engineering team and co-leads Zalando's InnerSource initiative. She's based in Berlin.

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Appendix

The Open Organization Definition

Preamble

Openness is becoming increasingly central to the ways groups and teams of all sizes are working together to achieve shared goals. And today, the most forward-thinking organizations—whatever their missions—are embracing openness as a necessary orientation toward success. They've seen that openness can lead to:

- **Greater agility**, as members are more capable of working toward goals in unison and with shared vision;
- **Faster innovation**, as ideas from both inside and outside the organization receive more equitable consideration and rapid experimentation, and;
- **Increased engagement**, as members clearly see connections between their particular activities and an organization's overarching values, mission, and spirit.

But openness is fluid. Openness is multifaceted. Openness is contested.

While every organization is different—and therefore every example of an open organization is unique—we believe these five characteristics serve as the basic conditions for openness in most contexts:

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

Characteristics of an open organization

Open organizations take many shapes. Their sizes, compositions, and missions vary. But the following five characteristics are the hallmarks of any open organization.

In practice, every open organization likely exemplifies each one of these characteristics differently, and to a greater or lesser extent. Moreover, some organizations that don’t consider themselves open organizations might nevertheless embrace a few of them. But truly open organizations embody them all—and they connect them in powerful and productive ways.

That fact makes explaining any one of the characteristics difficult without reference to the others.

Transparency

In open organizations, transparency reigns. As much as possible (and advisable) under applicable laws, open organizations work to make their data and other materials easily accessible to both internal and external participants; they are open for any member to review them when necessary (see also *inclusivity*). Decisions are transparent to the extent that everyone affected by them understands the processes and arguments that led to them; they are open to assessment (see also *collaboration*). Work is transparent to the extent that anyone can monitor and assess a project's progress throughout its development; it is open to observation and potential revision if necessary (see also adaptability).

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.

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.

Collaboration

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*).

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The Open Organization Ambassadors at Opensource.com

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The Open Organization Definition

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