

PURPOSE TO ACTION FRAMEWORK

A NEW WAY TO WORK THAT WORKS

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WELCOME

AGENDA

LECTURE

- Check-In Round
- Introduction
- Background
- About
- Key Shifts
- In Practice
- Anatomy
- Appendix

WORKSHOP

- Meeting Simulation

WRAP-UP

- Next Steps
- Discussion
- Closing Round

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CHECK-IN ROUND

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LECTURE

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- Key Shifts
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- Appendix

WORKSHOP

Meeting Simulation

WRAP-UP

- Next Steps
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INTRODUCTION

Jonathan's History

- Born in Madison
- Moved to San Francisco
- 4 Years @ HolacracyOne
- Software Developer → Coach
- Certified Holacracy Coach
- Consultant/Advisor

Jonathan's Background

- Montessori / Waldorf
- NLP, NVC, AR
- Computer Programming
- Creative + Spiritual + Technical
- Cooking, Cycling, Kettlebells

Jonathan's Purpose

Help people work better together

Effective Institute's Purpose

Demystify self management and make getting things done easier

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WHY SELF-MANAGEMENT

INTRODUCTION

OUR ORGANIZATIONS ARE STUCK

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OUR ORGANIZATIONS ARE STUCK

- Managers don't have all the information they need, and can't cope with the complexity they face
- People can't resolve their issues themselves
- The organization can't adapt to its changing environment

OUR ORGANIZATIONS ARE STUCK

- 3 Options**
- Continue the status quo
 - Create superhuman leaders
 - Take the work of management, break it down, distribute it across the org

OUR ORGANIZATIONS ARE STUCK

Many traditional organizations have **startup envy**

“Think like a startup”

- P2AF tells us...
- How to move in the same direction
 - How to know what needs to be done
 - How to know who should do what
 - How to get the work done
 - How to remove obstacles along the way
- Does this sound like “Management?”
- Organizational Alignment
 - Breaking down the work
 - Removing obstacles

What was it like at your first yoga class?

Found it awkward and uncomfortable
Heard words you didn't understand
Got corrected for every little detail
Thought those people were weird
Maybe you wanted to leave



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But as you started to learn...

The positions started to feel good, even natural
The language became second nature
You learned what to expect, what was expected
You started to see the value



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And once you went a few times...

You realized there was so much more to learn.

And so began your practice.

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Purpose-To-Action Framework is a practice.

Over time,

Skills deepen, you become graceful
Reasons for things make intuitive sense
You make it your own
...but you're never "done"



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Other useful metaphors for learning

Visiting a foreign country

You need a map at first, and the language is confusing

Learning to dance

What starts horribly awkward becomes effortless and graceful

Learning to play soccer

Children learn by playing, not by reading the rule book



BENEFITS OF PURPOSE-TO-ACTION FRAMEWORK

Benefits

- ✓ Clarity
- ✓ Responsiveness
- ✓ Leadership Capacity
- ✓ Speed of decision making

BENEFITS, EXPLAINED

Clarity means...

Knowing exactly what is expected of you, and what you can expect

Knowing who is doing what

Knowing who can make which decisions

Knowing what the most important thing to work on is

Knowing why you're doing what you're doing

Your next action on any project is clear

BENEFITS, EXPLAINED

Responsiveness means...

The organization can respond to a changing world ("Agility")

You can answer questions quickly and confidently

You can get answers quickly and confidently

Leadership Capacity means...

Leaders are freed to spend time on strategic decision making instead of managing day-to-day minutia (*micro-managing*)

People working on projects aren't slowed down by "helpful leaders" (*Capacity to lead yourself*)

Speed of decision making means...

The time between when a person asks a question and when they have an answer that satisfies them is reduced.

By over 90%.

Case Study: Washington Dept. of Technology (WATECH)



Case Study: Washington Dept. of Technology (WATECH)

"We averaged about 1-2 operational decisions per meeting. Now, with nearly a year of Holacracy we consistently make 20-25 operational decisions per meeting. The average time to introduce, discuss, and decide an operational issue is 2 minutes. This represents a 93% reduction in cycle time for decisions, while many other decisions are never even brought to meetings because they no longer need management approval for execution."

- Michael DeAngelo, Former Director at Wa-Tech



Case Study: Washington Dept. of Technology (WATECH)

"What was taking up so much of my time as a servant leader was solving other people's problems"

- Michael DeAngelo, Former Director at Wa-Tech

BACKGROUND

First evidence of self management ~1950

"Empirical evidence of self-managing teams can be traced to the 1950s when British scientist Eric Trist reported on self-regulating coal miners in his now famous article, 'Some Social and Psychological Consequences of the Longwall Method of Coal Getting.'

- Eric Trist

Origin of Holacracy, 2007

"[Most methods are created] by someone taking a set of ideas and constructing a system around them."

"I began to realize that rules and methods stemming from my ideas and principles were actually getting in the way of my ultimate search for a better way to organize."

"The process was more like discovering and capturing than designing"

Brian Robertson, Founder of Holacracy



Brian Robertson

HISTORY OF SELF-MANAGEMENT

BACKGROUND

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Self Management picks up speed, 2014

Fredric Laloux , Reinventing Organizations, 2014

Defines a developmental model for organizations

Considered "State of the art" in
Organizational Development



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WHAT IS SELF-MANAGEMENT?

BACKGROUND

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Five Stages of Organizational Development



Red "Impulsive"	Amber "Conformist"	Orange "Achievement"	Green "Pluralistic"	Teal "Evolutionary"
Mafia Street gangs	Army Catholic church	Wall Street banks Most MBA programs	Southwest Airlines Nonprofits and NGOs	Patagonia HolacracyOne
Division of labor, top-down authority	Replicable processes, a stable organization chart	Innovation, accountability, meritocracy	Empowerment, values-driven culture, stakeholder value	Self-management, accountability, wholeness, evolutionary purpose
Organization exists to serve power holders. Authority enforced by physical power.	Organized according to a group common belief. Shame and guilt used for enforcement.	Organization as Machine, Mechanistic, predictable, scientifically understood and controlled.	Has a sense of inclusion, and a drive to view and treat all people as equal.	Organization as Organism, World is integrated, people are called by an inner voice to contribute based on their unique potential.

Reinventing Organizations, Laloux, (2014)

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DEVELOPMENTAL MODEL

BACKGROUND

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What do we mean by "Teal Organizations"?

Self-management

Wholeness

Evolutionary Purpose

"Organization as Organism"

"Individuals contributing based on choice"

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SELF MANAGEMENT TODAY

BACKGROUND

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Self-management is everywhere

Buurtzorg Nederland

Healthcare

WATECH

Government

Morningstar Farms

Foods

WD-40

Manufacturing

VSE Inc

Technical Consulting

Zappos

Retail

Buurtzorg Nederland is "[A nurse-led model of holistic care that revolutionized community care in the Netherlands ... employs over 10,000 nurses and assistants in 850 self-managed teams supported by 15 coaches and 45 staff. (8% as opposed to 25% in comparable orgs.)]"

<https://www.buurtzorg.com/about-us/our-organisation/>

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Examples in nature – Order without rulers

Human Body Cell, Organ, Limb, Body

City Person, Household, Neighborhood, Town, City

The Internet?

ABOUT PURPOSE TO ACTION

What it is not

Culture Change	Conceptual
Values system	Democratic
Flat Organization	A Software Solution "Agile for X"

What is Purpose-To-Action Framework?

P2AF is a set of individual and group practices that optimizes for clarity, efficiency, and ease. It is a fork (modification) of the Holacracy business management methodology.

Said differently, it is...

- A set of Practices, Rules, Rituals (Processes)
- Provides structure while respecting autonomy
- Can be adopted one piece at a time
- Emphasize usability over completeness

Why fork Holacracy?

Holacracy is a complete, comprehensive system that changes how power works in organizations. The bar for adopting Holacracy is high. It is often said to be a 5+ year journey.

The goal if P2AF is to provide 80% of the benefits of Holacracy in 20% of the time and effort.

Some things

Anything you learn about Holacracy can be applied to P2AF.

It won't solve your problems, but it will show you where they are, and it will give you the tools to fix them.

It takes what you're already doing and standardizes it with the rigor of a world-class team.

KEY SHIFTS

Being Purpose-Driven

Purpose allows a group to orient toward a goal without explicit orders.

Evaluating actions against purpose is an effective way to make decisions toward a common goal without being told what to do or how to do it.

Purpose is superior to values because it can't be used to exclude and alienate people.

For any action, ask yourself, "Does this serve my role's purpose?"

Work "on" the organization, not just "in" it.

Most people work in their orgs without working on them.

Working "on" the organization is about changing the structure of circles and roles to refine what we can expect of each other.

Changing the structure is how organizations learn.

If you don't do this work, you are robbing the organization of learning.

The process is the teacher

Pobody's nerfect. Nobody starts out knowing everything.

You will never be as bad at this as you are today.

It's okay, even healthy, to make honest mistakes during meetings.

Since the process is designed for improvement, following the process (in meetings and daily practice) will result in learning and improvement.

Get on the field, try things. If you don't have the answer, just do your best.

Setting the scene

You're part of a navy seal team and you've just gotten orders to drop into a foreign country to perform an operation.

Everyone is working according to a set of duties so everyone knows they can count on each other. Some people have special duties and authority that help the team work smoothly. Other people have special skills that only they can do, that are needed for the team to complete its mission.

Setting the scene

We're on the plane about an hour away from the drop site.

We have one hour to make sure everyone has what they need to accomplish their part of the mission.

The huddle before we drop behind enemy lines is the Tactical Meeting.

In a *Tactical Meeting*, *Circle Members* bring *Agenda Items* to address *Tensions* they feel while working in their *Roles* towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

To address *Tensions*, people request information, share information, request projects or actions, and ask the Circle Lead to update the roles. The result of the meeting is new *Projects*, *Actions*, *Changes to Roles*, and new *Tensions*.

Outside of tactical meetings, people perform their roles' accountabilities and work on projects by prioritizing and taking actions. Anything that happens in a tactical meeting can be done outside of a tactical meeting.

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Tactical Meeting

A tactical meeting is a regular meeting of a circle, usually 1x/week. The purpose is to...

- ...ensure alignment with the goals and purpose of the team.
- ...surface information relevant the work of the circle and its roles.
- ...remove barriers to anyone's work with the full support of the team behind them.
- ...highlight how the circle can change to address changes in environment.

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Circle A circle is a team with a stated purpose and a number of roles that work toward that purpose. A circle is also a role, and like a role has accountabilities to the circle that it is a part of.

Circle Member Every person filling a role in a circle is a circle member. All circle members are invited to every tactical meeting. Only circle members may participate, but anyone may observe.

In a **Tactical Meeting**, Circle Members bring Agenda Items to address Tensions they feel while working in their Roles towards the circle's Purpose. Checklist Items, Metrics, and Projects are reviewed.

Agenda Items

The agenda is created on-the-fly (no pre-set agenda.) Each circle member adds as many items as they want from a private list that they maintain. New items can be added to the agenda at any time. Most items represent a tension coming from a role. The same item can be added by different people and will be processed separately. The same person may bring the same item more than once. The Facilitator chooses which item to process and each item is done when they agenda item holder gets what they need.

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Tensions

A Tension is any sense a person has that something could be changed or improved. Often tensions represent what a role needs to work toward an outcome. Tensions brought to a meeting must serve the Circle's purpose, otherwise the Facilitator can throw out the agenda item it represents. Each circle member is responsible for maintaining their own list of tensions. Tensions are fuel for change. Tensions are valuable.

TACTICAL MEETING

IN PRACTICE

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Roles

Roles represent the job functions in a circle. Each circle has 3 "core roles" (*Circle Lead, Facilitator, Secretary*) and any number of "dynamic roles." Roles are created and maintained by the Circle Lead. The Circle Lead "fills" (assigns) people into roles. Each person may fill more than one Role. A role can exist without being filled and can be filled by more than one person. Each Role can have a purpose and one or more accountabilities. Roles can also have projects, domains, and policies. Roles are often created or changed to solve a tension from another role.

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TACTICAL MEETING

IN PRACTICE

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Purpose

Each Role and Circle can have a Purpose. A purpose clarifies the identity and intention of the role, even absent any other information. It helps people in the circle or role orient their work. Purposes are often aspirational. A purpose cannot compel specific action. A good purpose leaves room for interpretation. When doing work on behalf of a Role, the role filler should ask, "Does this work serve the purpose of my role or the purpose of the circle?"

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TACTICAL MEETING

IN PRACTICE

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Checklist Items

A checklist item is type of metric, stated as a question or statement that has a yes/no answer. Each checklist item in a circle belongs to at least one role and may also be assigned to "all circle members". When answering a checklist item, the role filler can answer "Check", "No Check", or "No data." The rules for adding and removing checklist items are the same as for metrics.

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TACTICAL MEETING

IN PRACTICE

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Metrics

A Metric describes quantifiable value, typically a number, that represent something relevant to the work of the Circle. Each Metric in a circle belongs to at least one role and may also be assigned to "all circle members". When answering a Metric, the role filler can provide the answer, typically a number, or say "No data." Any circle member may add or remove metrics on any other role if it serves their roles. The Circle Lead has the authority and responsibility to maintain useful metrics on the Circle, overriding circle members.

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TACTICAL MEETING

IN PRACTICE

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Projects

A Project is a concrete outcome, typically described in past-tense. A project can be thought of as a series of actions that a person takes on behalf of a role. Projects can only belong to one role, but many roles can have a project with the same name. During Project Updates, each Role will give share only what's changed with each of their projects since the last update was given, or say "No Updates."

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TACTICAL MEETING

IN PRACTICE

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A Project is a concrete outcome, typically described in past-tense. A project can be thought of as a series of actions that a person takes on behalf of a role.

Actions

An action is a concrete step toward an outcome. These are the things we do every day, like "schedule haircut" or "check the mail". For any project, identify the next action you would take to move toward the outcome.

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TACTICAL MEETING

IN PRACTICE

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TACTICAL MEETING

IN PRACTICE

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Requesting information

Ask for information, opinions, data, or advice to help you get clarity. Avoid seeking buy-in, agreement or consensus. If concerned, ask,

"Does anyone see harm in _____?" or

"In my role as _____ I intend to _____. Are there any objections?"

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Sharing information

Announce or share anything you think another role or the circle needs to know.

To address *Tensions*, people request information, share information, **request projects or actions**, and ask the Circle Lead to update the roles. The result of the meeting is new *Projects, Actions, Changes to Roles*, and new *Tensions*.

Requesting projects or actions

Ask another role to work towards an outcome or take a specific action.

The person being asked needs to consider if the project/action fits their roles' purpose and accountabilities, and may accept or decline, but may not decline because of resources (time, money, energy, etc).

ex: "Would it make sense in your role as _____ to take a project to _____?"

To address *Tensions*, people request information, share information, request projects or actions, and **ask the Circle Lead to update the roles**. The result of the meeting is new *Projects, Actions, Changes to Roles*, and new *Tensions*.

Ask the Circle Lead to update the roles

This is how you create an ongoing expectation of another role.

This is also called a "Governance Change".

The Circle Lead may ask the role filler if the change makes sense, but does not need their permission to update the role. For example,

"I'd like to add an accountability to the office manager role to order printer paper."

Summary of the four pathways

Share your tension, then

- Request Information
- Share Information
- Request a project or action
- Ask the Circle Lead to update the roles

You may use as any pathway as many times as you want during your item.

In-Process, Out-of-process, & Time Outs

If you are confused about the process, you can ask the Facilitator for a time out.

The facilitator will call time out, and you can get clarity about how to use the pathways.

When done, the facilitator will call "time back in" and resume the process.

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Outside of tactical meetings

Each person must keep list of projects & the next actions and review it regularly.

When working, you must consider all of your projects and prioritize accordingly, choosing the next action on the project that you think will best serve the organization.

When asked to take a project, if it fits your roles, you must accept it, regardless of workload.

When asked about a project on your list, you must be able to provide:

- The relative priority of the project
- The next action of the project.
- A projection of when it might be done

You can take any action in service of your roles as long as it doesn't violate an existing rule.

Taking healthy action

Do what you think will best serve your roles and accountabilities.

Update your roles to match the reality of your work.

Don't ask for permission, seek consensus, or get agreement.

Don't be afraid to create tensions for others.

Be a Ferrari.

ANATOMY OF AN ORGANIZATION

Organization

Circles A circle is a role that contains other roles.

Roles A role describes expectations around an area of work.

Agreements Any written agreement between two entities.
(Person to Person, Person to Org, Org to Org, etc)

People People perform work in roles on behalf of the organization.

Circle

Roles Roles are different depending on the needs of a circle.

Core Roles All circles have certain "core roles" which perform required functions for the health of the circle.

Every circle is a Role, and so has everything a role has.

Strategies Heuristics (loosely-defined rules set by the Circle Lead) that serve to inform decisions made by roles in the circle.

The shape of a healthy Circle

- Have 2-20 dynamic roles
- Have 3-8 people filling those roles
- Hold regular Tactical Meetings once/week
- The Circle Lead updates the roles at least once a month (often more)

*** The Circle Lead is not the Facilitator**

In new circles, the Governor and Circle Lead are often filled by the same person

Traits of healthy Roles

- Have an inspirational purpose that orients and motivates the role filler
- Have at least one accountability, starting with an “-ing” word
- Is reviewed once a week by each of its Role Fillers
- When multi-filled, each role filler has a different focus

APPENDIX

Recommended technology platforms

Shared Live Document Editing	Google Docs, Office365, Notion
Easy video conferencing	Zoom
Group Communication platform	Slack, Asana, Teams, etc
Practice Management Tool	TealDog, GlassFrog, Asana, etc
Personal Organization System	Asana, OmniFocus, Things, 2Do, Wunderlist, Evernote, Apple Notes, etc

Optimal conditions for success	Requesting & Accepting Projects	Full Time, Part Time & Contractors
Working Agreements	Biassing for action in communication	Getting Things Done (GTD) practice
How to write good roles	Stating intention	Projections vs Deadlines
Criteria for filling people into roles	Official Circle Lead Prioritization	Domains & Policies
Evaluating Role Fit & Org fit	How to prioritize your work	Making autocratic decisions
Removing accountabilities from the Circle Lead	Aligning personal purpose with your role constellation	Going slow to go fast
How to write strategies	Technology Platforms	Pathways for getting someone to do something
Harm, Objections, & Integration	Basic required skills	What to do when something lands at your feet

WHEW

THANKS

HOLACRACYONE
TOPHER HUNT
BETH & HALEY

THANKS

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