

DANIEL MEZICK

THE BUSINESS AGILITY SERIES

InfoQ

AN INFOQ MINIBOOK BASED ON THE
LARGER BOOK OF THE SAME NAME.

THE CULTURE GAME

TOOLS FOR THE AGILE MANAGER

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Daniel Mezick

The Culture Game: Tools for the Agile Manager

Revision Number: 2.0

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Dedication

To Roberta,

for taking good care of me,

and for being a friend like no other

May 2012

The Culture Game

Table of Contents

Table of Sidebars	7
Table of Figures	8
Foreword.....	9
Part One: Preliminaries.....	14
Chapter 1 - Introduction	15
Chapter 3 - Tribal Learning Overview.....	25
Part Two: Tribal Learning Patterns and Practices.....	44
Chapter 6 - Introducing the Practices	45
Chapter 10 - Be Punctual.....	57
Chapter 12 - Announce Your Intent	63

The Culture Game

Table of Sidebars

1. Be Punctual.....	115
2. Punctuality at SeeEye Corporation	118
3. Rob Richman of Zappos Insights on Conducting	155
4. Inattentional Blindness	160
5. Iterative Work and Inspecting Frequently	173
6. Note: I am a coach	175
7. Authorization	190
8. Example: Boundaries at Zappos.....	191
9. Hold the Space.....	209
10. Liberating Structures	210
11. Luke Hohmann: Gaming Work	225
12. Game Challenges.....	224
13. Note: A Detailed Deconstruction of Tribal Leadership	231
14. Use Your Judgment	244
15. Take a Step Back	245
16. Resistance to Change	247
17. Pick One Thing.....	248

Table of Figures

Figure 1. Software Hacking Compared to Culture Hacking	19
Figure 6: The Tribal Learning Framework	29
Figure 7. The role of belief models	36
Figure 8. The Results Pyramid.....	38
Figure 12. The J-Curve.....	51
Figure 13. The Crack-high Curve	52
Figure 15. Concentric Rings of Social System Membership	66

Foreword

At Zappos Insights, we have the pleasure of introducing thousands of people to a values-based culture where workers actually enjoy their Monday mornings. Because we have created a great work environment while still delivering outstanding service and increasing revenue, we attract many authors and experts who like to study our culture. One of those is Dan Mezick.

Dan and I met when he was on tour, and asked hard-hitting questions to get to the source of what makes our culture tick. He asked it like a curious kid, fascinated by this new world. We continued to have conversations in the months to follow, and it started with me giving him information about Zappos, but it quickly changed to me learning from Dan about how culture really works.

Dan provides an ideal perspective because he has experienced corporate culture for himself (at Aetna), started a company (and managed over 70 people), and immersed himself in vigorous academic study (of the social sciences and system dynamics). The result is knowledge + experience = wisdom.

Before meeting Dan, I had not realized all the different dynamics of culture that are at play. And the key word here is “play” because Dan not only identified the games within our culture that I was unaware of, he actually helped us create new ones. I hired Dan to learn about team dynamics through an Agile framework. My intention was to learn Scrum, but what I really learned was how fundamental safety is to innovation (and many other seemingly unrelated connections). And rather than giving long lectures, Dan engaged us in games that experientially drove these points home.

While this book was in Dan’s mind before we met, I pushed him almost forcefully to create a body of knowledge he could pass on beyond his epic 1-to-1 interactions. And I am happy to say that rather than a long-winded, academic approach to culture change, Dan has provided high-leverage techniques to improve a culture almost immediately.

This can instantly work for you; though let me give you a fair warning because you may be in for an unpleasant surprise...

My favorite book on personal organization is *Getting Things Done* by David Allen. And let me tell you, the first time I read it I hated it. The second time I read it, I got it. And the third time I read it, I lived it. Why did it take me so long? Well, the cold hard truth is that the first time I read it, I wanted to get organized, but I didn't really *want* to get organized. I didn't realize it at the time, but I was more committed to keeping my life as it was, and all the comforts that came with it, than really taking on a deep change.

So honestly, I won't be surprised if you read this book, and say, "You know what, I don't like it, and it's not that good." And then I won't be surprised when the book seems to stare at you, look at you, begging the question – "Are you ready yet? Are we going to try this? Do you really want things to just continue as they are?"

But here is the good news – you don't have to implement the whole book. You don't even have to read it all. If you fully get just one piece of it, and run with it with full commitment... you'll see a huge shift. And even better . . . you'll probably have fun while you're doing it.

Rob Richman

The topics in The Culture Game are just now beginning to rock and roll in our world. In a little while, say 25 years or so - call it a generation – mighty changes will have been wrought. Perhaps you will then recall reading this book, back in the day, and maybe you will look back with satisfaction on the path upon which you thereafter walked.

After 25 years or so, all these various innovations around culture design and their relatives will have been through many refining iterations and changes. Then, there will come a time when all these innovations will have truly done their work: they will have catalyzed great movements. They will have caused, struggled with, and ultimately absorbed and made productive all the upheaval and tumultuous change that started with their very inception. Perhaps then, at that late date, you will remember this book, the wonders you encountered herein, and what steps you took as a result.

And when the whole great, epic cataclysm of magnificence wrought by the eventual success of culture design practices and their progeny has come to pass; when the fullest possible triumph of cultural engineering and culture hacking has finally been attained – and when the full cultural fruit and flower of Reason and Beauty are utterly manifest in all our daily lives, well, we can hope that you will then remember the sense of promise you may have first felt when you read these pages.

The Culture Game is about the work of cultural pioneers and innovators, and about the newly burgeoning trend of culture design. Moreover, The Culture Game is a kind of promise, and a call to a certain kind of future, a future for which the pioneers described in this book have made a down payment on all our behalf. This future – one we can all safely anticipate only to the extent we are willing to help create it - is a future wherein we will have fully designed all the aspects of the various cultures we daily inhabit, and made them all maximally supportive of our humanity, and of our possibility for interpersonal connection.

If you consider just for a moment the life you might live in an accidental cave you stumble upon versus the life you might live in the Palace of Versailles, you get a sense of the difference we contemplate between undesigned and designed cultures. The difference between lives lived in a designed culture to support us in all our human needs, desires, and dreams versus the random and accidental cultural dystopia in which we today conduct our daily struggles is an almost inconceivably vast and hugely beneficial difference.

That such a future beckons us now is an underlying premise of this book. Many of you may feel something of a call as you read these pages. As we have. This thing, this great change, is surfacing only now, and The Culture Game is evidence of that phenomenon. Hundreds and then thousands will help create the great change. Then millions and, finally, billions. That you are reading this book now may bode well for you. You may be feeling early what is now a tug for a few, but what will ultimately be an irresistible compulsive energy to the many. Perhaps if you pay

attention to the least little inclination now, it will repay you manifold over the years to come.

When all that is now clearly foreseeable in culture design has come to pass; and moreover, when much that is not now foreseeable at all but descends from what is at hand, when all that has as well arrived, then, at that moment, in the fullness of time, many of you readers of *The Culture Game*, Dan Mezick's early book on the topic, may well trace your happy involvement in the tremendous events that followed your reading it. You may even recall this audacious little introduction, which, perhaps you found encouraging, and which was written just for you by...

Jim and Michele McCarthy
In May of 2012

Part One:

Preliminaries

Chapter 1 - Introduction

What is the culture game? It is a game you win by upgrading your company culture to value continuous organizational learning. Because of the current pace of change, organizations that learn fast can repeatedly outflank and outperform their so-called peers. New companies can seemingly come out of nowhere to develop and dominate new opportunities and prosper. The pace of change bestows nearly immediate rewards on the most adaptive company cultures. To be adaptive as an organization, that organization must intentionally engage in continuous learning. Organizational learning is by no means random but rather, a highly intentional act. Getting there is a game... and culture is the name of the game.

The culture found in typical organizations is ripe for substantial improvement. The typical company culture does not encourage high levels of group learning. Instead, all sorts of artifacts clog company culture, including policies, practices, and procedures, some written and some unwritten. This clog reduces learning flows by discouraging experimentation, an essential raw material of organizational learning.

Developing a New Culture of Learning

Culture in a company exerts a powerful force on the participants. The observant need not look further than the career histories and current behaviors of respected leaders to get a clear understanding of what is actually valued in the organization. Those who get ahead are not giving lessons in the rules of the current game. Instead, participants typically must figure out company culture for themselves. Wiser participants rapidly learn to pay attention to what is *done* while discounting what is *said*.

This arrangement works against development of a culture conducive to group and organizational learning. Those who advance in the culture learn the game and perpetuate the current cultural arrangement. A few “win” by choosing to play by ***the rules***, while the majority becomes disengaged. Meanwhile, the business environment, driven by technology, changes rapidly and effectively punishes low levels of group and

organizational learning. Our company cultures are typically closed systems that respond slowly to change.

We are at a tipping point for management. Managers occupy unique positions to engage in the intentional shaping of culture in the direction of more adaptation. As a manager, you have the authorization to convene meetings, deploy budgeted funds for expenditures, and occasionally hire people. As a manager, you can encourage a new culture of learning by implementing learning practices proven to work at the group level. When your people learn as a team, they become more adaptable and achieve much better results, especially when the pace of change is fast. Teams that learn quickly are more adaptive than teams that don't. Adaptive teams are teams that can get better results, by rapid response to change.

Culture Hacking and Software Hacking

Prior to the late 1970s, it was difficult to gain access to computing power. Mainframe computing power resided behind glass walls in data centers; only a privileged few were able to gain access. That all changed when hardware manufacturers began creating small, inexpensive computers in the late 1970s, when the cost of computing power began to decline. In response, **software hackers** starting writing computer programs for personal use, and the era of **software hacking** was born along with the birth of the personal computing revolution. These applications often improved the quality of life by automating routine tasks and creating forms of entertainment like games. Before long, tech-curious people were programming small, inexpensive computers and building software applications for personal use.

As time passed, the microcomputer software industry was born, and the rest is history. The early software hackers created that industry.

That industry changed the world.

We are now facing a similar tipping point in the domain of company culture. For computers, the disruptive influence was the advent of the microprocessor, which made personal computers possible. In the culture space, the disruptive influence is the pace of change, driven by the widespread influence of technology in every aspect of society. Technology is accelerating the pace of change in business.

This acceleration of change is mandating an increase in (and more frequent) adaptation on the part of businesses, if they are to cope. Traditional corporate cultures are no longer adequate to succeed in the new world of business. Cultures that originated in the era of the industrial revolution are obsolete, precisely because they discourage learning at the level of organization. There is huge demand for a new culture of learning in our organizations. At issue is where to find tools to create this culture.

Culture Hacking Tools

With the advent of the computer revolution, it became standard practice for businesses to launch projects to develop software for their internal use. Dedicated, in-house information technology (IT) departments became the norm for most successful organizations. It was also typical that software design projects would fail, because software development is a complex process. This failure came at enormous cost.

Advanced forms of teamwork became necessary to deliver working software consistently. *Agile methods*, essentially team-learning practices, emerged in response to the enormous cost of failed software projects. For IT, the harsh complexity of software development became a laboratory for the development of repeatable team-learning practices. Pioneers like the signatories of the Agile Manifesto¹ developed techniques such as working in small iterations, inspecting frequently, and collecting continuous feedback from end-users. Agile processes harnessed change for the customer's competitive advantage.

¹ Beck, K., Beedle, M., Van Bennekum, A., Cockburn, A., Cunningham, W., Fowler, M., Grenning, J., Highsmith, J., Hunt, A., Jeffries, R., Kern, J., Marick, B., Martin, R. C., Mellor, S., Schwaber, K., Sutherland, J., & Thomas, D. (2001). "The Agile Manifesto." Retrieved from Manifesto for Agile software development website: <http://agilemanifesto.org/>

In the end, technology essentially created the crisis of rapid change, as well as the solutions for coping with it. Agile software development methods are in fact group-learning techniques. The sixteen practices described in Part Two were derived from Agile software development. They are in fact ***culture hacking tools***: practices that, if implemented correctly, can immediately raise the level of learning inside a team and the wider organization as a whole. It is now possible to apply these practices inside any organization that needs to become more adaptive.

Culture Hacking is a Bottom-Up Approach

Culture hacking is a bottom-up rather than a top-down process. Managers can deploy culture hacking tools, such as Agile methods, to alter the way the culture works inside a small team or a department. Such alterations to the culture are local in scope: when team or department members venture outside, the wider organizational culture will continue to dominate the thinking (and learning levels) of all participants. Even so, bottom-up culture hacking holds the promise to develop more effective teams and departments. And when managers who are engaging in culture hacking actively coordinate their efforts, the impact on the wider organization can be very impressive.

Culture hacking tools include new forms of structure for interactions, new forms of meetings, and new organizational designs. The building blocks of these culture tools include specific interaction protocols and specific fundamental social structures, such as ***triads*** and Scrum.²

Just like the computer software hackers of the late 1970s and early 1980s, the culture hackers of the early 21st century are building the tools needed to construct their ***programs***, but instead of computer programs, culture hackers are rewriting the culture in organizations. Figure 1 compares the software hacking of the 1970's and the culture hacking of the early 21st century:

² These building blocks are described in detail in later sections of this book.

Figure 1. Software Hacking Compared to Culture Hacking

Disruptive Influence	Computer Software Hackers	Company Culture Hackers
Advances in technology Platform to construct operating systems and applications	Microprocessor, driven by science	Rapid change, driven by technology
Timeframe to emerge Platform building blocks	Microcomputers	Business Organizations
Operating Systems Engineering Practices	1975-1985 Machine language code, low-level functions, and software structures	2010-2020
CPM, MS-DOS, Windows Software architecture and design	CPM, MS-DOS, Windows	Cultural codes, interactions, meetings and related social structures
Donald Knuth, and others in the domain of software development	Donald Knuth, and others in the domain of software development	Yet to be determined, still emerging
Create new code from scratch, using <i>homebrew</i> tools	Create new code from scratch, using <i>homebrew</i> tools	Cultural architecture and design Jay Forrester, and others in the domain of organizational development
<i>Refactor</i> or modify existing cultural codes, using <i>homebrew</i> tools	<i>Refactor</i> or modify existing cultural codes, using <i>homebrew</i> tools	

The early computer programming hackers had to create all-new application code for all-new platforms. These platforms for software applications included the early microcomputers such as the Altair. In the present day, culture hackers do not create new code from scratch. Instead, they modify the existing cultural codes, mostly by tinkering with meetings and interactions. Instead of an *all-new* platform, the platform is the *existing* organization. Culture hackers are actually in the business of *refactoring* existing cultural code on existing platforms. In computer programming, *refactoring* is the restructuring of existing code so that the

overall system displays more robust performance, and so that new levels of performance are more easily extended . . . and maintained.

Efforts to refactor the culture of an organization have the same goal.

Summary

Culture hacking is the active, intentional and iterative modification of existing cultural norms in your existing organization, with intent to create a stronger culture of learning. *The Culture Game* is a handbook for managers who want to alter the culture of their teams and departments. The Tribal Learning Practices found in Part Two are a set of tools for your toolbox as you embark on the journey of hacking your culture.

Everything is changing, and changing more rapidly than ever before. The rate of this change is increasing *like never before*.

- In 1978, Chris Argyris & Donald Schön published *Organizational Learning*.
- In 1990, Peter Senge published *The Fifth Discipline*.
- In 2001, a tribe of pioneering people in software published *The Agile Manifesto*.
- In 2008, Dave Logan, John King, and Halee Fischer-Wright published *Tribal Leadership*.
- In 2011, Jane McGonigal published *Reality is Broken*.

In 2011, I put these pieces together, and wrote this book as a manifesto. It is a manual containing specific practices and principles for increasing group learning inside *tribes*, groups of about 20 to 150 people. This book is a concise how-to manual of sixteen essential learning practices that you can use right now to encourage a greater ability to respond to change inside your teams, inside your personal network, and within your entire organization. What's next is up to you.

Who Should Read This Book

This book is for anyone working in an organization, especially *managers* who want to help their organization respond to challenges more effectively.

This book is a self-help manual for people in organizations who want to improve, be more effective, and make a bigger impact in the world.

This book is also for organizational coaches, executive coaches, and Agile coaches who deliver coaching to organizations in pursuit of great results.

This book is for anyone who wants to influence the development of a *learning culture* in their organization, and leverage faster learning to obtain great results.

This book is how-to manual to develop a more effective, responsive, and adaptive enterprise.

This book is for people in organizations who want to influence how their organization thinks, how it speaks, what it says, and how it behaves.

This book is for people in those organizations interested in helping their *tribes* become great.

If you fill one or more of the following roles in your organization, and want to obtain better results with others, then this book is for you:

- A member of a team
- A manager of people
- A convener of meetings
- A director of an organization
- An executive of an enterprise
- A leader

The last role is a very important one to understand well.

What is a Leader? Who is a Leader?

Leader is term that means many things to many people. When we think *leader*, some of us think of a *hero* who is a visionary who overcomes great obstacles to create a new world full of great results. Others may think of an *autocrat*, someone who imposes their will on the world (and those around them) to manifest results.

Usually, when we think of *leader* we think of charisma, that special quality that few people have, the quality that helps one person influence a great many people. The reality is that almost anyone can *choose* to be a leader, with or without the quality of charisma.

In this book, I define a *leader* as follows: *Anyone* who influences *anyone else* in a social setting, such as a team or organization.

Regardless of positional authority, every person has more influence than s/he typically believes s/he has. *Influence* in this book means the various processes that affect the thoughts, words, and actions of others. These definitions of influence and leadership mean that literally everyone already has some power, opportunity, and capacity to exercise leadership in their organizations.

As you will see, this book provides specific tools for anyone who wants to help their organization manifest results more effectively; it is a how-to manual for leaders of all kinds, who seek specific, actionable techniques to create results through more and better learning within their organizations.

Chapter 3 - Tribal Learning Overview

Tribal Learning Explained

Technology in general (and *software development* in particular) is a specific and powerful *driving force* in our society and culture. In the same way that the Medici bankers influenced culture during the Renaissance, technology and software development are influencing the period we are living through right now.

A perfect example is the Agile software development community, which continues to be a learning laboratory for *teamwork*. Designing and publishing software is a complex process. When teamwork on software teams is weak, it results in slipping schedules, cost overruns, failed projects, and very unhappy investors and end-users. The Agile community has figured out that teams must first become skilled at learning as a group. After this happens, the team produces high quality software. The Agile community has done the hard work of studying teams and teamwork, and now has the expertise to repeatedly create and re-create *teams* that rapidly learn. The result is working software that ships on time.

These teams are in fact small *Learning Organizations* as described by Peter Senge in his book *The Fifth Discipline*. The knowledge of how to create teams that learn is now available to any business leader who studies the available Agile software development literature.³

Scaling Agile to the Enterprise and Non-Technology Domains

There is a big demand to apply Agile techniques to non-technology domains like sales, marketing, finance, even executive leadership. The Tribal Learning Practices found in this book are intended to empower you to achieve this. These practices are distillations of specific Agile practices. For example, the Agile framework Scrum is based on iteration and very frequent inspection of results. The Tribal Learning Practices of

³ See the Bibliography for a list of Agile-related books, links, and papers if you are new to Agile software development methods.

{Inspect Frequently} and {Examine Your Norms} derive directly from Scrum. Likewise, Scrum prescribes a short set of meetings, and every one of these meetings has a designated facilitator. Tribal Learning extracts the practice of {Facilitate Your Meetings} and generalizes it for any team engaged in work that is complex and changes frequently. It is easy to apply Agile principles to non-technology domains by implementing the practices found in Tribal Leadership framework.

Everyone wants to scale Agile from the team level to entire enterprises. However, for typical organizations, scaling these Agile learning practices to the level of *enterprise* is a non-starter. Few (if any) organizations exist that currently serve as legitimate examples of enterprise-wide Learning Organizations as described by Senge. Fortunately, examples of teams that learn are very plentiful, thanks to the Agile software development community. This worldwide community, through trial-and-error, has learned how to develop and sustain teams that learn. The worldwide Agile community has solved the Learning Organization problem for a small and very specific organizational unit: the *team*, consisting of about 5 to 9 members.

Safe Space - for Learning

The problem is that Agile practices that work at the *team* level do not scale to the level of *enterprise*. Why? The primary reason is that Genuine & Authentic Agile teams operate in *safe space*. Creation of *enterprise-wide safe space* is a non-trivial problem to solve. This is the main reason that scaling Agile results to the level of enterprise is so difficult to achieve. Creating safe space for a team is *easy*; creating safe space inside an entire enterprise is *hard*.

Safe space is essential for group-level learning. *Safety* is a property of a *social space* where it is safe to take interpersonal risk. Safe space is a social space that welcomes the best idea, regardless of the source. Safe space encourages high levels of interpersonal risk taking, such as asking for help. In work-oriented groups like software teams, safe space creates a bias towards engaged, active, group-level experimentation with many possible solutions.

The creation of safe space is achievable inside software teams of 5 to 9 people by using Agile values, Agile principles, and Agile practices.

Safe space creates the potential for very high levels of rapid, group-level learning. We know how to create teams that learn; the key is the creation and maintenance of safe space. The larger question is how to engineer the creation of even wider safe spaces – *at larger scales* – inside our organizations.

Tribal Learning is the next step, the application of powerful team learning practices in the sweet spot – *above* the level of team and *below* the level of enterprise. The Tribal Learning framework is a set of specific ***interaction practices*** that any manager can immediately deploy in pursuit of great results inside his group of direct reports. Tribal Learning effectively scales Agile results to the next level – the *departmental* level, the *next* level up from teams. This is where managers have the greatest formal and informal authority, and influence. This is the sweet spot – where wider-scope cultural change is achievable and can happen quickly.

Tribal Learning is a set of tools and techniques any manager can use to influence culture in an organization intentionally. One manager using Tribal Learning can make a difference. Several managers, each with direct reports, working together – as a ***tribe*** – can strongly influence the *entire* culture of the enterprise.

Tribal Learning is most powerful when deployed by tribes of aligned managers and their direct reports. ***Tribes*** are groups of about 20 to about 150 people who hold a shared mental model about the tribe, the work, and the culture. Managers who work together to deploy Tribal Learning are, in fact, creating a mid-sized Learning Organization – a ***learning tribe***. Multiple informal ***learning tribes*** can tip your entire culture in the direction of genuine, enterprise-wide learning as described by Senge.

This book is a how-to manual that provides you with everything you need to deploy Tribal Learning in your organization.

The Three Essentials of Tribal Learning

The beauty of Tribal Learning is threefold.

First, Tribal Learning builds on the well-documented success of Agile principles and practices for teams. You leverage these proven principles and practices inside the Tribal Learning framework.

Second, you need no permission or budget to implement Tribal Learning in your organization. This means you do not have to appeal to

higher-ups for permission or request a budget to get started. You just start to do it, right now. If you are a manager, you have *already* been authorized to implement Tribal Learning in your group. You do not need to ask permission. This means you can start using Tribal Learning Practices immediately. Most of the practices involve simple, small changes to the meetings that you currently convene.

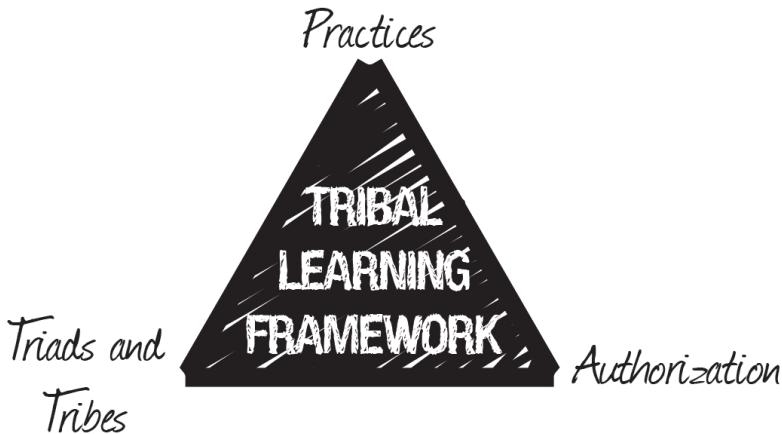
Third, the Tribal Learning strategy builds on the strong social structure of informal triads, which are three-person social structures.⁴ In a triad, three people function with aligned *values*, where each person is responsible for the quality of the relationship between the other two. In *Tribal Leadership*, the authors describe how to create, maintain, and sustain triads to informally organize work around shared objectives and build on their underlying shared values in pursuit of great results.

Tribal Learning is a set of tools for creating safe space, a lot of play, a lot of learning, and great results inside groups of 20 to 150 people. Tribal Learning is easy to learn, easy to explain, and easy to do. When aligned managers engage in implementing Tribal Learning together, they can tip the entire culture towards more safety, freedom, learning, and amazing results.

Figure 6 depicts the three-part framework for Tribal Learning, where managers can create safe space and group-level learning. This operational space exists just above the level of *team* and just below the level of *enterprise*. Tribal Learning is a *learning framework* that any manager can deploy today – alone, and with others – in pursuit of great results that will effect corresponding cultural changes. Tribal Learning builds upon a foundation of Agile practices, automatic authorization, and mid-sized, informal social networks known as tribes.

⁴ as described in the best-selling book, *Tribal Leadership* – see footnote 7

Figure 6: The Tribal Learning Framework



Tribal Learning, Part 1 – The Practices

The first component of Tribal Learning is the *set of patterns and practices* that are all rooted in the Agile software development community. These practices are all group-level behaviors exhibited by the very best Agile software development teams that I have observed. Most Genuine & Authentic Agile teams display *all* the Tribal Learning Practices, and thus support elevated levels of organizational learning. Effective software teams usually contain 5 to 9 people⁵. Tribes are groups up to 150 people. *Learning tribes* tend to do many of the Tribal Learning Practices.

The Agile community figured out how to convert typical, low-engagement teams into engaged, high-performance Learning Organizations, through outstanding work habits. Some of these habits, such as {Inspect Frequently}, are identical to standard Agile practices, while others developed because teams were doing genuine Agile and Scrum. For example, {Be Punctual} is a significant behavior that is a consequence of doing good Agile.

Agile practices and frameworks like Scrum encourage patterns of group behavior, like *managing your boundaries, paying explicit attention, being punctual*, and so on. These practices, such as facilitating

⁵ The phrase **Seven, plus or minus two** is common in Agile

your meetings, encourage very high levels of team learning. These practices are the first of the three essential parts of Tribal Learning.

Here is an example. You may recall from Figure 2 in Chapter 2 that the *Scrum* framework has five *values*. They are Focus, Commitment, Openness, Courage, and Respect. By implementing Scrum in a genuine way that honors these values, people doing Scrum begin to be more *punctual*. This is because punctuality strongly reinforces three of the five Scrum values: Respect, Focus, and Commitment. {Be Punctual} is a Tribal Learning practice that aligns with and supports Scrum values.

Tribal Learning, Part 2 – Automatic Authorization

The second part is automatic authorization. As a manager, you have people on your staff who report to you, and you have the authority to convene meetings. You typically invite your staff and others to meetings that you convene. Your supervisor is the source of the authority delegated to you. It may also be a cultural norm to convene meetings if you are a manager in your culture, meaning that a known, customary cultural norm is granting you at least *some* authority to convene meetings.⁶

A key feature of the Tribal Learning framework is that most of the practices in the framework do not require any additional permission from your boss. You can simply choose to *change a few things around*. When you choose to implement the Tribal Learning Practices, you are choosing to encourage, maintain, and sustain more group-level learning inside your staff and inside your meetings.

Note that, as a practical matter, it is essential for you to notify your people about your plans. You need to explain to them any policy changes, however small, so they will be comfortable and can situate themselves within your organization and inside your meetings. You are being respectful when you do this, because notification is a form of respect.

⁶ It is a worthwhile exercise to examine exactly where your authority to convene meetings comes from, since your authority is always granted to you from somewhere or someone. Note that you can “authorize yourself.”

There are many definitions for authorization. The one I like the best is ***the right to do work.***⁷ As a manager, you already have authorization to convene and run meetings. This means you may run these meetings as you wish. You probably already convene and execute these meetings according to current cultural norms in place within your wider organization. It may currently be normal for people to arrive late at the start of meetings. If it is typical for meetings to run later than planned, in effect you hold all the attendees as hostages until the meeting is over.

One of the tools in the Tribal Learning framework is the practice {Be Punctual}, which you may choose to implement in the following way:

1. **Your meetings now start on time.** You are always present five minutes before the start time.
2. **The door closes at the start time.** People who are late must open the closed door and then close it behind them.
3. **Your meetings now end on time.** You always organize the meeting content so this happens. You now never, *ever* end a meeting after the stated end time.
4. **Your meetings used to last 60 minutes or more,** and are now 50 minutes long, so that those attending have some time to get to their next meeting (if they have one) on time.

As to the question of who authorizes you to make these changes, the answer is simple: *you do*. The authorization comes with your role as a manager, and by virtue of your role as a convener of meetings. You have *automatic authorization*. You are *pre-authorized*. This is an essential feature of the Tribal Learning approach. You can implement Tribal Learning in your organization immediately, right now, precisely because you are *already* authorized.

⁷ This definition comes from the Group Relations community.

Click the FAQ menu item on the home page: <http://www.akriceinstitute.org/displaycommon.cfm?an=1&subarticlenbr=34>

Authorization is an interesting subject. We often use the words *empowerment* and *permission* to refer to aspects of authorization. In this book, I define *authorization* as the right to do work, borrowing from the Group Relations community. This community actively examines the roles of leadership and authority in groups, conducts conferences, and publishes research on these topics.⁸

For an excellent discussion of authorization, I suggest you examine the paper *The BART System of Group and Organizational Analysis* by Zachary Gabriel Green and René J. Molenkamp.⁹ This paper provides an excellent framework for deconstructing boundary, authority, role, and task in a way that is useful for anyone who wants to make sense of the processes of innovation and change-making in organizations.

Authorization is often constrained by limitations that are undocumented or are otherwise unclear. The BART paper provides excellent coverage of these dynamics, breaking down authorization into various types such as *personal authority*, *formal authority*, *informal authority*, and so on. A major strength of the Tribal Learning framework is that it leverages your formal, positional authority as a manager to direct your staff, convene meetings, and so on. Don't ask permission!

You can start to generate substantial group-level learning in your organization simply by deploying the Tribal Learning Practices by yourself, with your own direct reports. This is powerful and can contribute to immediate results. The next step is to implement the Tribal Learning framework with other managers, in effect by collaborating with them to manifest change in your organization. (This subject is the focus of the next section.)

⁸ You can learn more at the website: <http://www.akriceinstitute.org/>

⁹ Green, Z. G., & Molenkamp, R. J. (2005). The BART System of Group and Organizational Analysis, Boundary, Authority, Role and Task. See: http://akri.affiniscape.com/associations/8689/files/BART_Green_Molenkamp.pdf

The same issue of authorization applies to budgeting. Since most Tribal Learning Practices revolve around interactions and meetings, there is no additional budget required, although the practices {Get Coached} and {Socialize Books} do cost something and you may have to request a budget for them. Other than these two exceptions, no Tribal Learning Practices cost a dime, and that means you do NOT have to ask for funding of any kind.

Tribal Learning, Part 3 – Triads and Tribal Leadership

The third part of Tribal Learning is *tribal leadership*. Tribal Leadership is a collaboration and leadership framework described by the authors Dave Logan, John King, and Halee Fischer-Wright in the book of the same name. In that book, the authors describe how three-person groups known as *triads* can transform teams and entire organizations.

A single manager can deploy the Tribal Learning Practices in this book with good results. As a manager, you can choose to deploy some of these practices inside your group. The Tribal Learning Practices create safe space and encourage elevated levels of group-level learning. As elevated levels of learning occur within your group, they may influence other groups that attend your meetings. This is the first level in implementing the practices.

The next level of implementation is encouraging other groups to try the Tribal Learning Practices. The best way to do this is to identify other managers who are willing to try it. The key is to *identify* and *align* with other managers who share *values* with you. Starting small is the right idea here: to get started, identify and align with just *two* other managers around Tribal Learning. This three-person structure is known as a *triad*.¹⁰ It consists of three people with aligned *values*, where each person is responsible for the quality of the relationship between the other two.

Since all managers have direct reports and all managers convene meetings, the result is that three managers influence a large group of people. Over time, the people using the Tribal Learning Practices see the *results*. Many of these people begin to value openness, respect, and

¹⁰ See footnote 7

continuous improvement. They begin to value (or more strongly value) acts of focus, commitment, and courage in individuals and in the wider organization. They begin to *align* their values. The people who hold these values and feel this alignment are in fact becoming a *tribe*.

The entire purpose of implementing the Tribal Learning Practices is to build a *learning tribe*. A learning tribe can easily respond to change and adapt. A learning tribe thinks, notices changes, and quickly adjusts. A learning tribe can design, build, and deliver great products on time every time.

A Note on Open Space and Tribal Learning

One of the Tribal Learning Practices is {Open the Space}. This is an important practice to generate an increase in organizational learning along several important dimensions. The Open Space meeting is a special type of facilitated meeting. The Open Space meeting begins with a large circle of chairs arranged for opening the meeting and ends when the facilitator closes the meeting. In between, participants convene small group sessions around the stated meeting theme.

The Open Space meeting format is very *tribal* and engaging. This type of meeting is specifically designed to be open, and maintain safe space. The closing circle presents the opportunity for participants to describe their Open Space experience, and close the meeting. Participants in the closing circle often report feelings of high learning, high play, and high engagement with others.

Use Open Space to create safe space, enable smooth organizational transitions, mix perspectives, and re-mix the learning. I advise you to create a recurring date each year that includes an Open Space meeting ritual. This recurring cultural event can generate a re-telling of the current story of your organization and **re-hydrate** the cultural values of openness and honest communication in your tribe. Use Open Space to mix and re-mix the Tribal Learning, to punctuate organizational transitions, and generate learning.

Beliefs, Behavior and Results

All change in organizations is *belief change*. A good example of change takes place with the introduction of Agile practices inside

software teams. Agile teams start working as soon as they have enough actionable guidance to begin. This is the opposite of the *waterfall* approach, which encourages extensive up-front planning and a sequential series of steps. Early in a project, the Agile method is empirical while the waterfall focuses on study, planning, and prediction. Each approach requires a set of underlying beliefs. The waterfall method assumes that prediction of all variables is possible, while the Agile approach does not.

Assumptions, Beliefs and Mental Models

We know the world through our *mental models*. We construct them and then we use them to navigate the world. Mental models are a collection of assumptions about how something works, like a toaster, an automobile, a team, or an organization. For example, you have a mental model of how this book is organized and what is in it. When you think about this book, you refer to your collective set of assumptions about it, including the topic, the length, and the organization of the material. You might hold some assumptions about me, the author. Collectively then, this set of assumptions constitutes your mental model of this book. The assumptions are actually *beliefs*.

Assumptions

What we commonly called *assumptions* are actually very strong beliefs, so changing them is a non-trivial operation. Our mental models contain all sorts of beliefs that form the overall model. Each belief in a model is essential but not sufficient in itself, as they function as a group or a set. The *complete* set of assumptions is what makes the model tick. A change of just one belief in the set may break the model, and then we need to question all the beliefs in the model. Since all change is belief change, this is what makes all real change genuinely hard to implement.

Personal Mastery and Belief Change

All learning is change, and all change is belief-change. When you learn, you modify (software people might say *re-factor*) your beliefs. People who are always learning are constantly changing their models. They have become adept at responding and adjusting to new information and knowledge as it becomes available to them.

Figure 7. The role of belief models



Note: In this model, Individual ↔ Models (Filter) ↔ The World

From Figure 7, you can see the rub: ***we interact with our models***, not the world per se. This means we *filter our experience of the world through the models* - through the collection of assumptions and beliefs we currently hold. These assumptions and beliefs literally frame and contain our reality. Our models literally determine what we pay attention to and do not pay attention to, what we see and do not see, what we hear and do not hear, and what we perceive or do not perceive. The ***how it happens*** when something *occurs to us* is a function of how our models *filter* the information around us.¹¹ Teams and organizations filter their input in big ways.

We know the world through our models. When our models are working well, we feel comfortable and at home in the world. When they

¹¹ For a great practical discussion of how things **occur to us**, and the relationship between our language and our models, see: Zaffron, S., & Logan, D. (2009). *The Three Laws of Performance: Rewriting the Future of Your Organization and Your Life*.

do not, we experience discomfort and often feel a crisis or forced awareness.¹² The steps work like this:

1. Some kind of change occurs in the environment that invalidates our model;
2. The actual change-event itself does not occur to us, because we are filtering the input through our now-invalid model;
3. More events occur in the environment, which we do not perceive at all, so we do not recognize their importance.
4. Eventually, the evidence of multiple events becomes overwhelming, and we notice changes. We also notice that what we currently believe is not working well anymore.
5. We experience a forced awareness or crisis that mandates our explicit examination and inspection of current results.
6. We realize that our assumptions are incorrect, that things do not work the way we thought they work. Only then, do we make changes to our assumptions and update our mental models.

Now we can see the problem; all change is belief change, and all belief change is difficult, because beliefs interconnect to form complete models. A crisis of forced awareness occurs when you realize that your model is not working. Forced awareness causes you to begin the hard work of examining your assumptions. The work is difficult because

¹² The term **forced awareness** is borrowed from the book *The Disciplined Trader: Developing Winning Attitude*. by Mark Douglas. (1990). Douglas describes his experience with bankruptcy, and how he subsequently lost everything, all due to a set of limiting beliefs. After the forced awareness, he embarked on journey to identify and hold new beliefs and a new, more valid model of the world he works in, which is the world of commodity trading and speculation.

making even one small change in even one of your assumptions has ripple effects throughout the inter-connection in your mental model.

The Results Pyramid

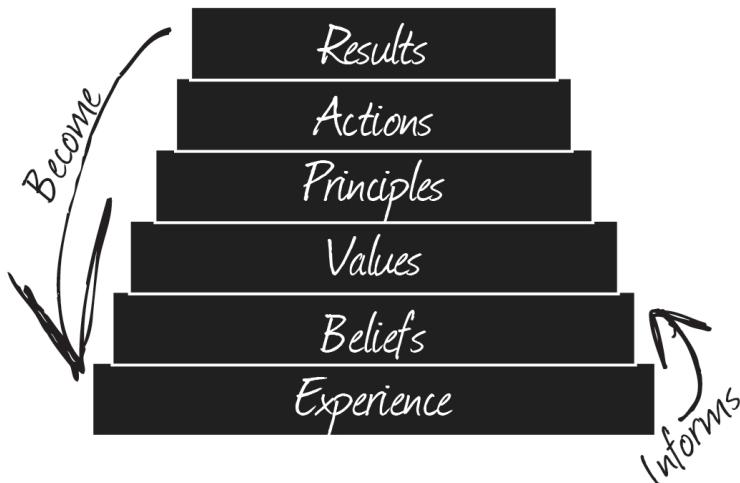
We can now examine the structure of the assumptions, beliefs, and the mental models we hold. This is important to understand to generate more learning in your teams, your department, and your organization.

Results are built on Actions, Principles, Values, Beliefs, and Experience. Let's examine each in turn. It is important to note that the following description is equally applicable for individuals, teams, departments, and entire organizations. The model for results is depicted in Figure 8, The Results Pyramid.

Experience

The first level of the results pyramid is Experience, which powers belief. Our perception becomes our reality, as we believe what we see and hear. Experience shapes and informs our beliefs.

Figure 8. The Results Pyramid



Beliefs

A belief is an assumption that something is true or false most of the time or all of the time. Beliefs are mostly assumptions about how something works. Our mental models consist of our beliefs. Remember, we perceive and interact with the world through our models, not by interacting with the environment per se.

Beliefs come in various forms, and include both predictions (assumptions about the future) and judgments (opinions on what *should* happen). We make sense of our environment through models that are composed of beliefs, including predictions and judgments. Once we have a good working model and begin to use it, we tend to learn more slowly or even stop, because we have *figured it out*. Then, when we ask questions, it is not to learn something new, but rather to validate our current model, and make sure it is still good. Models are collections of beliefs about how a specific thing works. We hold models for *car, work, family, team, project management, et cetera*. Models are a specific collection of beliefs labeled with names. Our beliefs inform our *values*.

Values

Over time, we develop a list of things we value. For example if we believe prediction is possible, we learn to value the process and results of planning. If we believe that the world is a harsh place, we learn to value caution. If we believe the world is a welcoming place, we learn to value friendliness. Values inform *principles*.

Principles

Principles are *rules of thumb* - heuristics that align with our values and provide guidance for action. Principles make our values appear real to use. For example, if we value openness and courage (which are Scrum values), we can construct principles for action that align with our values, as the principle ***honesty is the best policy*** links values to behavior. A principle is a bridge that offers guidance for action. A complete mental model usually includes principles – rules of thumb that guide action. The Agile Manifesto has 4 ***core values*** and 12 ***supporting principles***.

Actions (also known as “Behavior”)

Behavior is action. In humans, the acts or behavior that we observe reflects what a person *actually* values. A person’s behavior usually aligns with their principles, values, and beliefs. To know what a person values, simply observe their behavior, which is the pattern of how they act. This is also true for teams and organizations. To know what a team or organization values, observe collective behavior. Principles and values inform behavior to create *results*.

Results

Behavior generates results, and values inform behavior. Results usually follow from behavior that is consistent with a person’s current beliefs, in which case the results are intentional. You act deliberately and intentionally based on your model. You do a behavior, supported by values and beliefs, with the expectation that you will get specific results. The intention equals the result when you get what you expect. Surprises and *learning* occur when the results do not map to your model. Surprises and learning occur frequently when you do *experiments*.

Results Compile to Experience

Now it gets interesting. We eventually inspect our results, and reduce them to *held experience*. This is memory that contains some emotional energy. Recall that experience informs beliefs. When you experience something inconsistent with your beliefs, you experience surprise. This raises suspicion about some of your held beliefs. As beliefs are part of a mental model, the model, or at least a part of it, no longer is valid.

Changing Mental Models

Now we have a general framework to achieve good results. Results come from behaviors. We can try new behaviors without changing any beliefs. We simply act *as if* the behavior might deliver the results we want. If we do some new behavior and get good results, the good results compile to experience. If the experience is at odds with some of our held beliefs, our beliefs become suspect. We then might choose to examine and change them. For example, in light of new results and experience,

we may delete a current limiting belief and replace it with a new more useful belief. This is learning.

Learning consumes energy, because it takes time to know the world from our models and construct them. Changing them takes even more time – and more effort. Models are collections of interwoven, interlocking beliefs, which is why change and learning is difficult. Suspending disbelief long enough to try something new is harder than it looks. Acting *as if* something might be true is a form of experimentation. Experimentation generates results and experience and potentially, a large volume of learning. Surprises are nothing more than results that are not supported by our assumptions – our mental models of how things work.

Individuals, Teams, and Organizations

All of this plays out not just individually but also in our teams and organizations. If learning, change, and adaption are difficult for individuals, how much more difficult are they for teams and organizations? The Tribal Learning system helps close this gap by providing a framework and set of tools for creating more organizational learning.

The culture of an organization is the shared mental model held by many members in the group. It is the collective set of stated and unstated assumptions about a number of concepts, and especially the work they perform and how they relate to each other. It includes assumptions about *what* we do, *why* we do it, and *when, where, and how* we do it. Talking about culture is talking about a model. It is a shared mental model containing collectively held beliefs and assumptions.

Changing the culture is an exercise in changing the shared mental models held by the members of your tribe.

The Results Pyramid: Why You Care

You care because *behavior is the key leverage point*. Behavior is action and generates results. Results compile to experience. Experience informs beliefs. Behavior, therefore, is *the* key leverage point. Behavior is what you can do to change the shared mental model held by your group, your teams, and your organization as a whole, as shown in the Results Pyramid.

The Tribal Learning Practices described in this book are behaviors to do as a group. These behaviors generate results that will be *surprising*. By doing them, you encourage higher levels of learning at the group level, *not just the individual level*. This higher level of group learning leads to a more robust ability to respond to change and to obtain the results you are seeking in your organization.

Any manager who convenes meetings can implement Tribal Learning Practices. By more fully utilizing the authority *already* vested in you as a manager, you can effect positive change. You can have more fun with your people, enjoy a more open and honest way of working together, and generate great results. All of this can happen without asking for permission, asking for authorization, or asking for a budget.

By working with other managers who share your values, you act to distribute the Tribal Learning Practices in a coordinated, collaborative way that directly affects and influences an entire *tribe* – a group of from 20 to 150 people. When you do this, you will achieve the scaling of Agile learning practices from *teams* to *tribes*. You can achieve this by following the steps outlined in Part Three, which describes how to form *triads* – working relationships among three managers who hold a set of shared values. Multiple triads of managers implementing Tribal Learning Practices in an organization can directly influence the culture of that organization over time.

The Three Points of Leverage

Influencing organizational culture involves influences on three leverage points. These include the Tribal Learning Practices, your authorization as a manager, and the use of triads as described in Part Three.

Managers in large and mid-size organizations can use the Tribal Learning system to elevate learning levels and create a culture that easily anticipates change. A culture of learning has more fun by valuing openness, commitment, service to others, courage, and purpose. To create a learning culture in your group, you, the manager, need to understand the importance of *psychological safety* and *safe space*. Safe space for learning is essential.

This is the subject of the next chapter.

Part Two:

Tribal Learning

Patterns and

Practices

Chapter 6 - Introducing the Practices

The Genesis of the Tribal Learning Practices

The Tribal Learning Practices are actions you can take immediately to elevate the level of learning in your organization. These are actionable steps you can take to today, that do not require attendance at a class, do not require you to understand any theory, and over 80% of the steps outlined here do not cost a dime to implement. Best of all you probably do not need authorization to do these. As such, the practices provide an actionable framework that can help your department, division, and organization become more adaptive by learning faster as a group.

My experience since 2006 includes playing an Agile-coaching role for software teams moving to Agile practices, primarily Scrum and Kanban. I also coach executive teams in how to be great together. What I have noticed over the years is that many of the organizations I coached were not ready for the move to Agile. They often had **baked-in** obstacles in the culture that prevented Genuine & Authentic Agile to take root. They often experienced long periods of painful adjustment to what the reality of **going Agile** actually meant.

I found myself asking certain questions quite a bit as I gained experience coaching Agile.

- What can I offer to these organizations, which are not really ready for Agile?
- What suggestions can I make to prepare them for a move to genuine Agile and Scrum?
- What steps can they take in preparation to make a move to Authentic Agility?

As I paid more attention to these questions, I noticed some things and was able to bring them into sharper focus.

- First, I searched for cheap, easy-to-understand steps that any organization could take to prepare BEFORE a move to Agile.

- Second, I noticed that many of the most progressive organizations I was coaching were ALREADY doing several of these practices before I arrived.
- Third, I noticed that if an organization used an Agile framework like Scrum, they would, in fact, end up doing many of these practices.
- Last, I began to notice that the truly Agile organization was exhibiting a *flow of learning* that came, in part, from a willingness to do many of these practices. The organizations that are able to implement most of these practices are, in fact, Learning Organizations.

And then it hit me: Agile practices are those that help manifest a Learning Organization as described in Peter Senge's book, *The Fifth Discipline*. The difficulty found in implementing Agile is the same difficulty you encounter when you attempt to increase the quality and quantity of organizational learning. Further, I discovered a correlation between the impediments to Agile adoption and impediments to an organization's transition to a Learning Organization. That is because, by definition, the Agile organization has mastered learning at the level of enterprise.

The Relationship Between Agile Practices, the Tribal Learning Practices, and Organizational Learning.

Think of these practices as pre-Agile practices. If you do them, you start moving in the direction of Agility. As you know from the introduction, Agile software development practices are actually practices that encourage and manifest a lot of learning. By adopting these practices, you can get prepared for an Agile framework like Scrum and then be successful using it.

These practices are also the result of *doing* Genuine & Authentic Scrum. That means that Scrum supplies a structure that helps manifest many of these practices. Mature Scrum teams that actively engage in *paying frequent attention* and *examining what are the norms* find that, through adopting these habits, they increasingly deliver great results, whether or not they use Scrum.

Scrum encourages the practices, all of which encourage increased organizational learning.

Using the Tribal Learning Patterns & Practices

You can think of the practices as *policies*, although the word policy is a loaded term. People tend to associate it with bureaucracy and a command-and-control approach. A policy is simply a rule to guide decisions and achieve intended outcomes. Due to the triggering nature of the word policies, in this book I refer to the policies as *the practices* or *the patterns*.

For the most part, you can implement each of the patterns without spending a lot of money. There is no need to understand theory, take a training course, or make a big investment of time or money. You can simply review the list of patterns and practices, pick those that make the most sense for you and your organization, tailor them, and put them into place. When you have done so, your organization will be better able to face the very substantial challenges of moving to Agility and become a Learning Organization.

If You Are New to the Tribal Learning Practices

Perhaps your organization is already doing many of these practices. Great! Now tune them and tighten them up. More likely, though, is the possibility that you are doing few, if any, of these policies. In that case, select three, four, or five policies that are easiest for you to do. By doing them, you can achieve the following:

- Upgrade the tribe-level learning of your team or organization
- Transfer the lessons of Agile to your wider organization, not just your information technology department
- Prepare for Agility and using an Agile framework like Scrum

If you have issues using Agile Frameworks like Scrum

Perhaps your organization is using Scrum or other Agile practices and getting mixed results. The reality is that Scrum, Kanban, and Lean all actively encourage the practices. Scrum, for example, encourages us to *examine our norms* via the Retrospective meeting, which is clearly

defined in the Sprint Review step of Scrum. Kanban, via structured and active visualization of workflow, encourages us to *pay explicit attention* to the flow. Lean, with the *go to the gemba* practice, encourages us to *inspect frequently*.

This is a big deal: the practices of Scrum, Kanban, and Lean all strongly encourage the Tribal Learning Practices. This means that if you can do some of these practices, you are *transcending Agile, Scrum, Kanban, and Lean*. You are already there precisely because you are doing the practices. This means you are in an excellent position to become (and, in fact, BE) a Learning Organization.

The practices are summarized below.

1. **{Be Purposeful}** Everything hinges on leadership. You cannot lead if they cannot follow. State your overarching purpose early and often, using short-form structured speech. Make it easy for those who follow you to understand your vision, your mission, and your statement of short-term intent.
2. **{Facilitate Your Meetings}** Use a page from the Agile playbook and facilitate all your meetings. Facilitated meetings provide space for the convener to observe and reflect. These same meetings tend to have a clear goal, a clear set of rules, and a clear way to track progress. Facilitated meetings are good games.
3. **{Examine Your Norms}** Normal is what you willingly tolerate. Examine your norms, because what you tolerate is a minimal level of what you insist on. What you insist on is more likely to happen. Insist on norms that encourage tribal greatness.
4. **{Be Punctual}** The whole group cannot learn together if the whole group is not present. Punctuality associates with focus, commitment, and respect; these in turn associate with individual and group greatness. Encourage punctuality to manifest genuine and authentic greatness in your tribe.
5. **{Structure Your Interactions}** Use protocols to clarify essential interactions. Employ structured speech as a tool to clarify the meaning of what you say.

6. **{Announce Your Intent}** Be easy to follow by announcing what you intend to do. Do not fear being blocked by opponents. Instead, rely on your clear signals to attract followers and helpers who align with your intent. Announcing your intent is making a request for help. State what you are doing with purpose.
7. **{Game Your Meetings}** Meeting suck when attendance is not optional, when the goal and rules are fuzzy, and when there is no way to track progress. Make meetings fun, enjoyable, and engaging by gaming them. Use working agreements to give structure and clarity to your set of rules in the meeting-game.
8. **{Conduct Frequent Experiments}** Frequent experimentation means frequent learning. Make learning into a game, by scheduling frequent, cheap experiments. Failing cheap means learning economically. Fail frequently, but never start an experiment until you know exactly how much it will cost.
9. **{Manage Visually}** The books Gamestorming and Visual Meetings are pointing to something. Radiate information and use visual artifacts to define physical space that in turn will influence thoughts and perception.
10. **{Inspect Frequently}** Change is the new normal. Extensive change means high complexity. Use iteration and frequent inspection to make a game of change. Inspect and retrospect frequently as a tribe.
11. **{Get Coached}** Coaching helps the learning process and is a best practice. A coach will see what you do not and cannot.
12. **{Manage Your Boundaries}** Good fences make good neighbors. Be mindful of boundaries for authority, role, and tasks. Loosen boundaries for inquiry and dialogue, tighten boundaries when deciding and executing. Manage boundaries to create the kind of space your tribe needs to accomplish every kind of work.
13. **{Socialize Books}** Books contain ideas and concepts that you can leverage in pursuit of tribal greatness. Select the

right books to reiterate the beliefs, values, and principles you want. Encourage people to talk with each other about what they read.

14. **{Pay Explicit Attention}** Ignorance is *not* bliss. Pay attention to what is working and what is not. Zoom in on details and focus on interactions and results. Discuss what you see with the specific intent to be excellent.
15. **{Open the Space}** Open Space meetings are fantastic for managing the integration of transitions, evolution and learning in groups. Stimulate your tribe's development by convening periodic Open Space meetings. These meetings generate opportunities for expression, inquiry, dialogue, and learning.
16. **{Be Playful}** Play games to get work done. Bring in new games and pay attention to existing games you are already playing. Use games for simulation, work, and learning.

You can deploy these practices in any order. You can mix and match what you select to fit your context and ability to execute. Doing just two or three of the practices will make it easy to add more of them, as they all support each other.

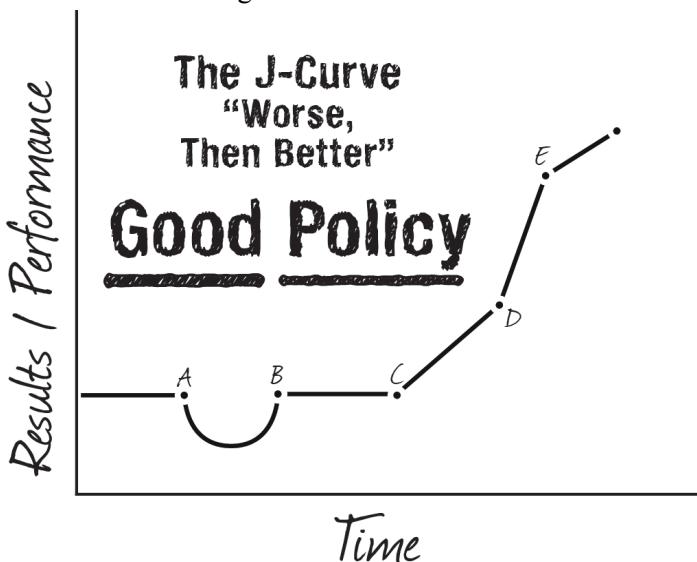
Delays are Normal: Understanding Delays and Systems

Delays in achieving good results are common, even when taking steps that have good, long-term characteristics. The opposite is also quite true. Steps you take today that yield an immediate intended result often end up costing you quite a bit in long-term negative effects. The Tribal Learning Practices do tend to have some delays associated with them. Understanding the nature of delays is important when you start to implement the practices.

Good Habits Make You Worse, Then MUCH Better

It is a general fact that good steps taken today usually do not have an immediate positive effect. The truth is that you often get worse before you get better.

Figure 12. The J-Curve



As an example, consider the step of committing to higher education. There is a large body of evidence which documents that higher levels of education are associated with higher levels of income, although there is a substantial delay in obtaining the intended results of a higher income.

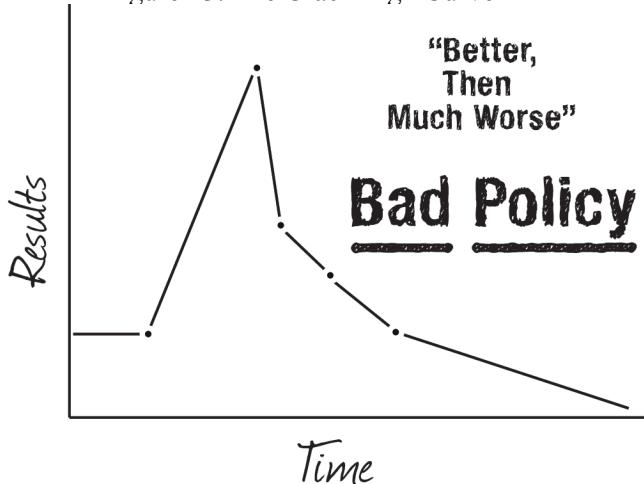
Most good habits are like this. Obtaining more and higher education requires substantial time, effort, and money. Over the short term, these results do not appear great. However, over the long run, your income and quality of life can (and often will) substantially improve after a delay. A good habit like paying attention to what you are eating can leave you hungry and irritable, as you make periodic adjustments to your diet. Exercise is another example – short term, it can cause you to feel tired and sore. However, both of these habits are associated over the long term with more vitality, better ability to focus, and a longer life. Diet and exercise are examples of habits that are painful to start, habits that make you short-term *bad* and long-term *great*.

In your organization, good habits like the Tribal Learning Practices can cause short-term pain and long-term gain.

Bad Moves Make You Better, Then MUCH Worse

Alcohol can make you feel good over the short-term yet leave you with a hangover the next day. Habitual abuse of alcohol associates with the long-term results of liver damage and many other problems. Abuse of alcohol is a great example of how you can feel good from something that is bad for you long-term. Other examples include habitual drug abuse and poor sleep habits. These types of habits make you feel good in the short run, even as you are destroying yourself over time.

Figure 13. The Crack-high Curve



In our organizations, we often institute steps that lead to more of what we say we want to avoid. A good example is adding more people to a late project. In software projects, we know that adding more workers to a project ultimately will make it run even later. We know this, yet we still often do it. This is because at first, it seems to work. At first, we will accomplish more work but, as time passes, we will need to explain things to the new workers, and acclimate them to the project. We need to educate and inform each new worker, as they get deeper into tasks of greater complexity. We will also experience an increase in team-level communication overhead to deal with as we add more people. Each of these longer-term effects conspires to slow the project down. Highly skilled team members start to get frustrated as they realize how much more work they have to do to bring the others up to speed. This tends to

chip away at team morale, which is likely to be declining by this point. Little by little, the project slows down as team velocity actually declines. What starts as a good idea with the best of intentions will actually contribute to the very problem that the *solution* was supposed to help solve.

Tribal Learning Practices create results with Little or No Delay

What we really want to do in our organizations is get some good results without waiting very long. This is exactly what the practices are designed to do. Each step produces results after a brief delay or no delay. You should realize that some delays are good, like the delays that come from implementing good habits that will have long-term positive effects.

Each of the practices may have delay associated with it. Examine the description of each step and be sure you understand the potential delays in results that you can expect.

Other Consequences

Each of the practices has consequences. These consequences may include:

1. Delays
2. Explicit examination of norms
3. Role changes

Realize that the practices are going to have you questioning the current habits of your organization. This can be painful to participate in, and even more painful as you experience some delayed results. Try to resist allowing the delays to encourage you to *backslide* into the old ways of doing things. For example, developing punctuality around your meetings can be very painful. As your organization notices how difficult punctuality can be to implement, the search for immediate results begins. When those results are not immediate, there is a tendency to return to the old way of being. Although necessary, explicit examination of norms will add to the pain as the organization learns.

Valuing People Over Roles

This pain can increase as people begin to work in new ways, often assuming new roles. For example, when an organization implements Scrum to help promote teamwork in software teams, the rules of the game demand that everyone fit into one of only three roles: **Product Owner**, **Team**, or **Scrum Master**. In organizations that value roles more than they value people, this transition is not a safe one for the people who must abandon their old roles and take up new ones. Awareness of the fact that Scrum is a proven framework to develop great software using teams does not reduce this discomfort at all. People tend to be uncomfortable in new roles and with new ways of working, the very means to achieve improved results. As you incorporate more safety in your organization, higher levels of tribal learning will happen in your organization, often after a painful delay.

Tribal Learning Values

At the root of using the Tribal Learning Practices is a set of **values**. These values support high levels of learning and a certain playful attitude about work and work-related problems. People doing the Tribal Learning Practices tend to identify with and value the items listed below. These Tribal Learning values derive from the learning frameworks found in the Agile, Scrum and Lean communities-of-practice that exist worldwide. They were derived from two core ideas:

1. Respect for People
2. Continuous Improvement

The Tribal Learning values are:

- Serve Others
- Be Purposeful
- Communicate Honestly with Respect
- Create Relationships
- Increase Learning
- Be Open-Minded

- Adapt to Change
- Create Fun
- Be Focused, Committed, and Courageous

Let's look at each of these nine in turn. These nine values encourage respect for people, continuous improvement, and the Tribal Learning Practices, in the following ways:

1. **Serve Others:** Implementing Tribal Learning Practices serves the entire organization by making it more responsive and adaptive to change. The pace of change is increasing. Implementing practices that encourage tribe-level adaption serves the entire organization.
2. **Be Purposeful:** Change for the sake of change is pointless. Having a clear purpose is associated with greatness in teams and organizations.
3. **Communicate Honestly with Respect:** Honest communication associates with greatness in teams, tribes, and entire organizations. We must value honest, respectful communication to have a significant chance to make learning happen at the group level on a consistent basis.
4. **Create Relationships:** A focus on work, especially creative work, does not bear fruit until relationships are in place that will support respect and continuous improvement.
5. **Increase Learning:** There is no adaptation without learning. Seeking learning at the level of group is associated with greatness, by embracing, identifying, and responding to change.
6. **Be Open-Minded:** Openness is associated with the safe space needed for identifying problems, suggesting solutions, and asking for and receiving help. Always accept the current best idea regardless of the source, and always disclose what you want, think, and feel when working with others.
7. **Adapt to Change:** Openness creates safety, safety encourages learning, and learning creates the potential for adaptation. The pace of change mandates that we encourage

the creation of conditions that allow the entire organization to adapt rapidly.

8. **Create Fun:** Playfulness and fun are part of any satisfying game. We seek to game the work, so that we can opt-in, have clear goals, have clear rules, and have a clear way to measure progress. Good games have these properties and are enjoyable.
9. **Be Focused, Committed, and Courageous:** Focus is the concentration of attention. Commitment is the act of binding yourself to a course of action. Courage is a quality of spirit that enables you to face danger or pain without showing fear. These qualities must be present in our groups, to achieve our aim of continuous improvement.

People who are predisposed to the Tribal Learning Practices enjoy them precisely because already they hold most of these values. Those who might not enjoy the Tribal Learning Practices probably do not.

Implementing some of the practices can immediately signal the identities of people aligned with these values and those who are not. Since opting-in voluntarily is a core requirement of any good game, make sure to handle objections in a constructive fashion. Specifically, if you have people in your group who are resistant to participating in the Tribal Learning Practices, it is essential that you continue to be respectful when you interact with them. Do not close the space to exclude dialogue and inquiry, because doing so is counterproductive to group learning and to the Tribal Learning practice {Open the Space}.

It is completely acceptable and normal for some people to resist or be intolerant of what we are trying to accomplish. The main thing is to be sure (*beforehand*) that most of the people in your group are enthusiastic, while you maintain the space open for people to express their thoughts.

With these ideas in mind, we can describe the details of each individual Tribal Learning practice.

Chapter 10 - Be Punctual

Overview

Being punctual is associated with the values of commitment, focus, and respect. These values associate with greatness in teams and individuals. Stop screwing around. Be great by showing up on time, every time. Respect people and improve with them by being punctual. Model greatness by being there.

The whole group cannot learn if the whole group is not present. When people are late, this delays the start of the meeting or even worse, their lateness requires the meeting to re-start to bring them up to speed. Every meeting has potential for group-level learning. *Punctuality* encourages and supports learning at the level of group. The whole group learns when the whole group is present.

Punctuality is a practice your organization can choose to execute at any time. Implementing this practice does not require any expense, and can be implemented immediately, assuming everyone involved is willing.

Appointments are fundamentally very simple agreements. They are commitments to others, to be in a certain place – or on the phone– at a certain time. As such, punctuality is an important part of strong culture that includes *focus*, *commitment*, and *respect*.

These are three of the five essential values¹³ associated with the Scrum framework.¹⁴

How Punctuality Encourages Learning Throughout the Organization

If you are punctual, I can strongly argue you are likely also very focused and committed, and respectful in your interactions.

13 Scrum is supported by five underlying values. Focus, Commitment, Respect, Focus and Courage. See: Schwaber Ken and Beedle, Mike, Agile Software Development with Scrum, p. 147.

14 Scrum Guide. See: <http://www.scrum.org/scrumguides/>

If your entire team, department, or organization can be punctual, you are sure to have higher levels of engagement in your group-level interactions. Higher levels of engagement are essential to group-level greatness. This is the primary advantage of implementing punctuality as a norm in your organization. The behavior helps your organization develop higher levels of engagement.

Pairing punctuality with facilitated meetings is a great way to get immediate results.

Costs

There are no actual costs associated with implementing this policy. You simply decide to do it.

Results and Related Delays

You can expect a delay in compliance on the part of some number of people who purport to understand and agree to the arrangement. Once a majority of people honor the agreement to be punctual, you can expect the benefits to accrue to the entire organization. These benefits include:

- Fewer meetings
- Better and more productive meetings
- Much more attention paid to good time (boundary) management
- Higher levels of focus, commitment and respectful interactions
- More time for reflection in between meetings. Having adequate time to reflect is important for rapidly integrating learning.

Challenges

The policy of punctuality, like all policies, usually requires that all the people involved opt-in. This provides a sense of control essential to basic human happiness. It is important that the policy is clearly specified, agreed-upon, and adhered to. The ***agreed-upon*** aspect is going to be tough if you dictate it. It is far better for the people to be involved in the decision to implement the policy.

“Be Punctual” may seem too rigid in some national cultures and certainly too rigid for some corporate cultures. Further, in the chapter {Open The Space} a meeting format called Open Space is discussed. Two of the principles of this meeting type are *Whenever It Starts is the Right Time* and *When It's Over It's Over*.

Whenever It Starts is the Right Time. Being punctual seems to conflict with these ideas. What gives here?

Like any practice, {Be Punctual} is not applicable to every single situation. You must use your judgment to apply it effectively. Open Space is a meeting format that is intentionally loose in terms of start and stop time. Applying {Be Punctual} to Open Space is a very bad idea. Likewise, some meetings that are strictly about dialogue and inquiry (brainstorming and discussion) need to be looser in terms of start and stop time.

For typical meetings that are a mix of exploring ideas and reaching a decision, {Be Punctual} is useful for encouraging focus, respect, and commitment. Applying

Adhered-to usually requires some kind of negative incentive or sanction in the event the person in question does not follow through on the stated commitment.

Like many of the practices, you will find that implementing the policy is going to force an explicit examination of what is holding you back. This can be painful to acknowledge.

Steps and Options

To encourage punctuality, create a system of positive and negative incentives around the subject of being on time, specifically for meetings. The typical policy is to collect a highly symbolic one dollar from each person who is late. The payment symbolizes the valuing of punctuality and the devaluing of lateness.

The pool of collected dollars can be spent by the group every month, for example the 4th Friday of the month, at a restaurant or bar where the members can socialize and tell some stories to each other about organizational life and the punctuality policy.

One thing that happens right away when you implement this policy is you get many questions. You get *detailed* questions. Questions revolve around specific details, like:

- If I am late by 1 minute or less, am I late in fact?
- Which clock do we go by?

Punctuality to your meetings can make them more enjoyable and focused. Use your judgment.

- What if I only have a 5, 10, 20, or 50-dollar bill? What if I have no bills in my pocket if and when I am late?
- We use Outlook. When invited to a meeting, the options are {Accept}, {Decline}, and {Tentative}. If I do not decline the invite, am I obligated to attend and if I do not am I late?¹⁵

The bottom line is, when you implement a policy of punctuality, everyone needs to know about all the *edge cases* – all of the exceptions to the rule. As an organization, you realize that other things have to change. For example, if the building you work in is a large one, starting meetings at the top of the hour (1PM, 2PM etc.) and running them for 1 hour is no longer an effective way of working. This is because it takes up to 15 minutes to leave the current meeting, optionally use the bathroom, collect yourself, and use the stairs or elevator to get to the next meeting, etc. If your workplace is in a large building spanning multiple floors, you need to shorten meetings to 50 minutes. For example, start 1:05PM and end at 1:55PM.

This is all part of explicitly examining what is *in the way*. Jim Collins in the book *Good to Great* calls this ***Confronting the Brutal Facts***¹⁶. Even a simple policy like punctuality requires a careful and explicit examination of the facts. This explicit examination is itself a very useful exercise for organizations preparing for a move to Agile ways of working.

Implementing punctuality as normal is actually a very small version of implementing Agile in your organization. You immediately notice

¹⁵ See the sidebar “Punctuality at a SeeEye Corporation” for a discussion on how implementing Punctuality can actually play out. SeeEye is the fictional name of a real organization where a friend worked while I was coaching several Agile teams in her organization.

¹⁶ Good To Great, Jim Collins, p. 65

what is holding you back. Often, these obstacles are cultural. The ***current normal*** is normal at several levels. People are habitually late precisely because there is support for it across the entire organization.

While we are discussing punctuality, now is a good time to mention the use of cell phones and laptops during meetings. These devices severely reduce engagement levels by making it normal and acceptable to be distracted when someone else is talking. This is especially true of the higher-authorized individuals in your company. When a C-level person places starts interacting with a phone during a meeting, the signaling is clear: ***whatever is being said now does not matter***. Even when the phone is being used to take notes, the impression is that the person using the device is distracted, or even worse, displaying disrespect.

Takeaways: Be Punctual

- Punctuality as a norm explicitly devalues lateness and tardiness. It forces the people in the organization to notice how loose the culture is with respect to keeping appointments. It takes openness and courage to establish punctuality as a norm.
- Punctuality associates with valuing focus, commitment, and respect. These are actually values associated with the Scrum framework (the remaining two are openness and courage). Focus, commitment, and respect as associated with greatness in individuals and organizations.
- The most common way to implement this policy is to institute a small sanction like a one-dollar penalty for being late.
- Like most policies that require people to adhere, it is best if they opt-in and agree in advance to willingly participate.
- Punctuality as a policy requires an explicit examination of what has to change to make the policy capable of implementation in your organization. Expect to have to make changes that support the new way of working.

Chapter 12 - Announce Your Intent

Overview

Announcing intent is perhaps the most important activity of genuine leaders. Leaders and followers who announce intent are doing everyone on their team a HUGE favor by eliminating guessing and information delays and by allowing others to adjust to plans. Announcing intent is almost the same as soliciting help. Soliciting help associates with team greatness. Announce your intentions early and often.

To announce your intent, you must know what you want. This clarity helps everyone around you, and increases safety levels and associated levels of group learning.

History and Origins of the Practice

Teams, departments, and divisions are smaller social groups inside a wide organizational context. These are all *social systems* that engage in substantial levels of self-organization. Software teams using the Scrum framework display very high levels of self-organization precisely because the framework encourages this behavior. It is useful to note that Scrum mandates the announcement of intentions from both the Product Owner role and the Team role.

The Team role, composed of individual members, is authorized and responsible for handling the Daily Scrum meeting. In the meeting each team member is required to answer the question, “what are you doing today?” This amounts to a Scrum requirement to announce intentions daily, regarding work and related tasks. Likewise, a team’s Product Owner in Scrum is required to clearly describe the product to be built. The description goes into an ordered list called the Product Backlog. This document amounts to a clear statement of intent for the product.

It is noteworthy that, per the rules of Scrum, the Product Owner and Team members are required to announce their intentions. *Self-organizing* social systems thrive on a lot of timely information. Announcing intentions makes it easy for teammates, co-workers, and colleagues to adjust to your plans in a way that helps you.

Remember the definition of **leader** at the start of this book: A leader is *anyone* who influences *anyone else* in a social setting, such as a team

or organization. Announcing intent is a powerful way to exercise leadership in a self-organizing world.

How This Helps

Announcing intent is a form of disclosure, and disclosure is associated with greatness inside teams. No one can offer to help you if they have no knowledge of what you are working on, what problems you are facing, or your aims and intentions. Announcing your intent amounts to a passive request for help. You are disclosing information that is useful to anyone who may be able to help you. Such announcements amount to a unilateral broadcast of information that does not require a reply from the receiver. Upon broadcasting the unilateral message, others in the wider social system may choose to either help you or not.

Costs

There are no dollar-costs associated with announcing intent. You do not need to ask for a budget. You do not need to ask permission. You do not need anyone else's authorization. You can simply do it. Scrum is pointing the way by mandating the announcement of intention from the Product Owner and Team in the Scrum game. This is a big tip-off that there is something powerful in this method of increasing levels of information disclosure.

Announcing intent costs nothing and greatly helps the overall efficiency of the working groups and tribes in which you have membership.

Results and Related Delays

Experiment, since delays in results will vary according to the maturity of your group. If the space is safe for learning, you may see immediate results. If the culture supports a lot of information-hiding and information-silos, you may shock some people with your level of openness. Experiment with announcing intent and inspect the results frequently.

Details

Jim and Michelle McCarthy, the creators of the Core Protocols and the authors of the book *Software for Your Head*, discuss how huge quantities of help are available from others who are aligned on your intentions and have proximity to you.¹⁷

When you announce your intentions, you are creating implicit space for others to either help you, do nothing, or block you (blocking is covered below in a later section). When everyone is announcing their plans and intentions, what is being shared is essential information about the work. Self-organizing systems are *information-bonded*, meaning that information is the glue that holds them together. Announcing intention is a powerful way to influence what is going on inside your group.

According to Jamshid Gharajedaghi, author of the book *Systems Thinking, Managing Chaos, and Complexity*:

There are fundamental differences between the nature of the bond in mechanical systems and the nature of the bonds in sociocultural systems . . . while the elements of a mechanical system are 'energy bonded', those of sociocultural systems are 'information bonded.'¹⁸

Social systems such as teams are *systems* precisely because the participants share information within them. Social systems are information-bonded. Information is the glue that holds the self-organizing system together.

High communication frequency is associated with greatness in teams. By broadcasting information about your plans, you invite others to help you as you increase the level of available and important information in the wider social system. This act encourages and supports more tribal learning, especially if you have some positional authority in the organization.

¹⁷ Jim and Michelle McCarthy, *Software For Your Head*, p. 253.

¹⁸ Jamshid Gharajedaghi, *Systems Thinking: Managing Chaos and Complexity*. (2nd ed.). p. 83.

Figure 15. Concentric Rings of Social System Membership



Jim and Michele McCarthy say this about asking for help when working in teams: “Being great means not accepting the old way of doing things. Being great requires that you intentionally change your behavior after thinking about the ideal way to behave, and then following through with courage.”¹⁹

Leaders, particularly those with positional authority, can become better leaders by experimenting with this. Followers are constantly paying attention to leaders with positional authority. Followers ascribe meaning to even the most random behaviors.²⁰

When leaders do not announce intentions, the followers often make guesses about what the leader wants, leading to all sorts of waste. Art Kleiner covers this dynamic in some detail in his book, *Who Really Matters*, where he devotes an entire chapter to guesswork, describing

19 Jim and Michelle McCarthy, Software For Your Head, p. 253

20 signaling by leaders is covered in Part1, see
Psychological Safety

how followers want to help leaders. When leaders send either no signals or unclear signals, the followers often engage in guessing.

Organizational theorist Charles Hampden-Turner calls this kind of phenomenon ***amplification***. When you are a Core Group member, a process takes place in which your remarks appear amplified; people hear your statements louder, stronger, and more command-like than they seemed to you when you uttered them. Casually mention a product you'd like to develop someday, and discover, three weeks later, that someone spent a million dollars introducing it. Wrinkle your nose when talking to a new hire and discover, years later, that they have been systematically steered away from attending any more meetings with you. Why does this happen? Because nobody knows exactly what you want. They assume it part of their job to guess. Even if you are that rare kind of boss who displays clear signs that you are eager to be asked for clarification, your subordinates will still tend to guess instead of ask. You would do the same.²¹

We have a name for leaders with positional authority who clearly announce intentions. We call them ***visionary***. The clearest example of a bold announcement of intent from a positional leader was when President John F. Kennedy declared the national goal, “to land a man on the moon and return him safely home before the decade is out.”²² This was a clear, unilateral statement of intent. Announcing intent makes following easy.

Challenges

Announcing intent in unsafe environments can cause anxiety as you realize that if you tell the truth about intentions, others may block your best efforts. Most corporate workplaces do not value openness and often punish it. Suck it up. Try announcing your intentions in low-risk

21 Art Kliener, Who Really Matters: The Core Group Theory of Power, Privilege, and Success, p. 75.

22 before a joint session of Congress in May of 1961, see <http://history.nasa.gov/moondec.html>

situations, see what happens, and then inspect your results. Keep in mind that all interactions are games²³, and allow people to opt-in to help achieve your clear statement of intent – your clear goal.

When you announce intent, you set up attraction and repulsion. Some are attracted even as others are repulsed. One thing that happens when you announce intent and follow through is that the very act of announcing becomes part of the landscape. Those in proximity to you adjust, and many incorporate your announcement into their own plans, in effect helping you. In Scrum, during the Daily Scrum meeting, this is exactly what happens. Team members adjust to each other based on what they know to be your intentions for the day.

Steps and Options

Implementing this practice involves the following steps:

1. **Discuss It Openly.** You may choose to discuss the self-organizing power of announcing intent and the attraction and repulsion dynamics openly. By paying explicit attention to the dynamics of announcing intention at the level of group, you can get better results. In unsafe workplaces, where learning levels are low and sticking your neck out is risky, you can openly discuss these dynamics inside your own team. Doing so makes that smaller space safer and more conducive to higher levels of group-level learning. Discussing the communication technique of announcing intentions and then using this is a powerful cultural statement. That statement tends to support higher safety levels inside your group.
2. **Announce Early and Often.** Use low-risk opportunities to state your intentions about everything. If you intend to work late, say so. Likewise, you can experiment with stating what you plan to do about lunch, what time you are coming in tomorrow, and what you plan to do tonight. Experimenting with broadcasting low-risk information can give you the experience you need to start really using this powerful technique. When you broadcast your intent to do something, it has great impact. You are asking for

help and attracting others to your cause. The power of this technique is proven in Scrum and is always part of what smooth-running, self-organizing teams and groups are doing.

Takeaways: Announce Your Intentions

- All social groups are naturally self-organizing systems; the people in them naturally adjust, and re-adjust, to the actions of the other members.
- Everyone can influence how the system behaves by simply announcing intentions and following through. Over time your statement of intent becomes predictable and reliable as part of the environment; it becomes part of the picture.
- If you are a leader, start leveraging all the attention you are getting by knowing what you want and announcing it immediately.
- Social groups like teams and departments are information-bonded. The more information that is available, the smoother the group can function.
- Lots of information is associated with the feelings of safety that create the conditions for tribal learning. Make the space safer by providing as much information as possible about your current plans and intentions. Scrum points the way by mandating the Team members and the Product Owner to announce intentions explicitly.
- Your organization might not be safe and learning levels might be low. You do not need anyone's permission to start announcing intentions as a habit. Experiment with announcing intent unilaterally and watch what happens.
- As soon as it makes sense, start discussing how this communication style helps the team by making essential information about the team widely available to itself. Pay explicit attention to changes in the way the team behaves after having these discussions, and work to accelerate increased levels of available information, safety, and learning.

