

DC Organizational Agility Practitioners

Tuesday, June 7, 2016

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Welcome to the DC Organizational Agility Practitioners Meet-up!

- Typically held the first Monday of the month from 6-8:30pm
- Help us groom our Topic backlog
- LinkedIn Discussion Group
- We would like feedback:
 - Information Accuracy?
 - Parking?
 - Metro?
- Suggestions for improvement?

Open Positions and Job-Seekers

Our sponsors, Blackstone Technology Group and Pliant Solutions are looking to hire fantastic agilists.

+DevOps Engineer

+Jira Administrator

If you are looking for new excitement and energy in your career please make sure to let us know.

You can leave a business card in the basket if you wish as well

On Deck

June 6th, 2016

- John Hughes: Integral Agile Series – Spiral Dynamics

July 11th, 2016

- TBD

Proposed

- Integral Agile Series – Integral Theory (Ken Wilber)
- Customer Engagement model
- Lean product development flow (Don Reinertsen)
- Systemic Thinking & feedback loops (Peter Senge - The 5th Discipline)
- Integral Agile Series – Integral Agile framework (Agile Coaching Institute)



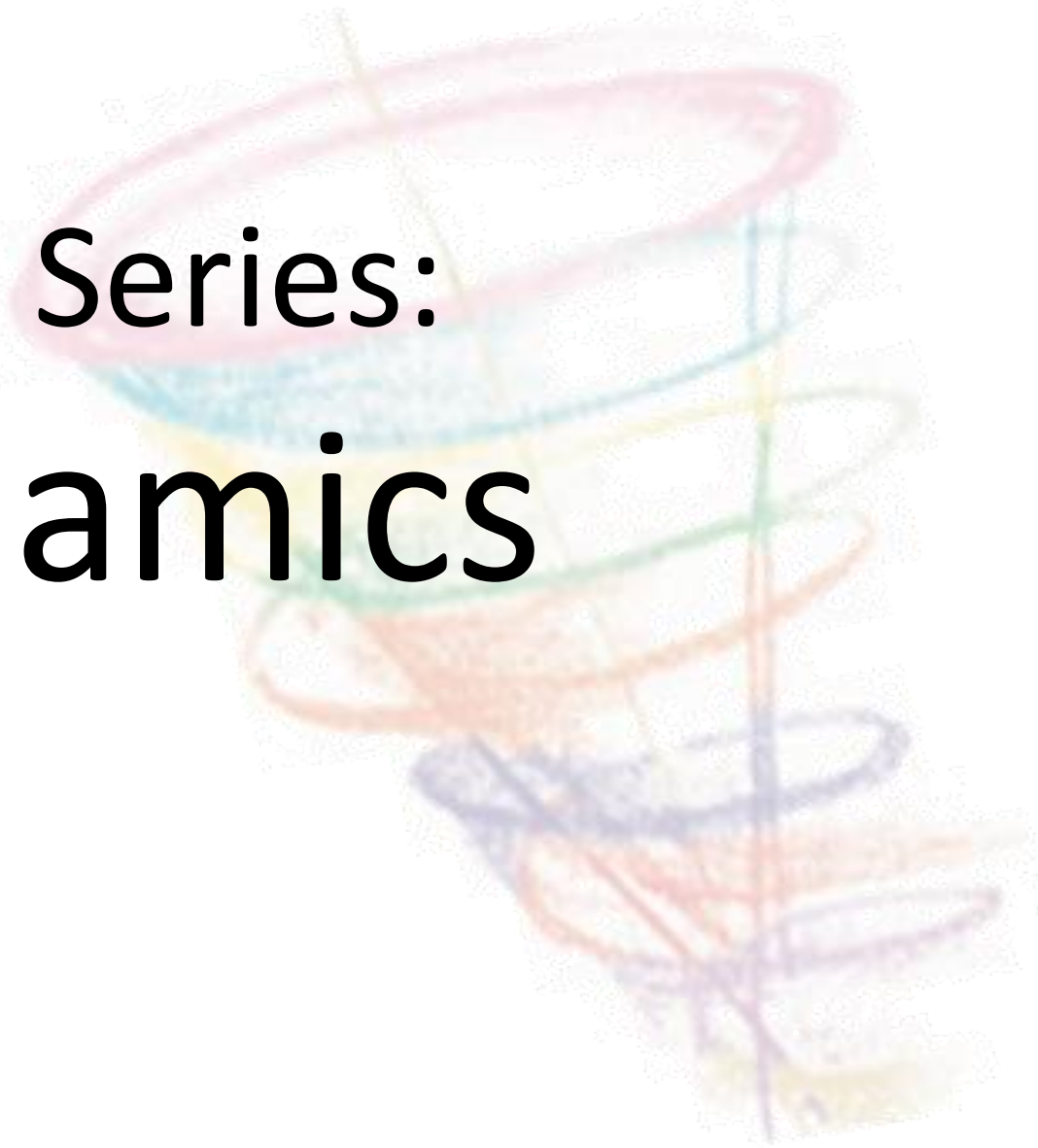
Introducing Tonight's Presenter

HELLO

my name is

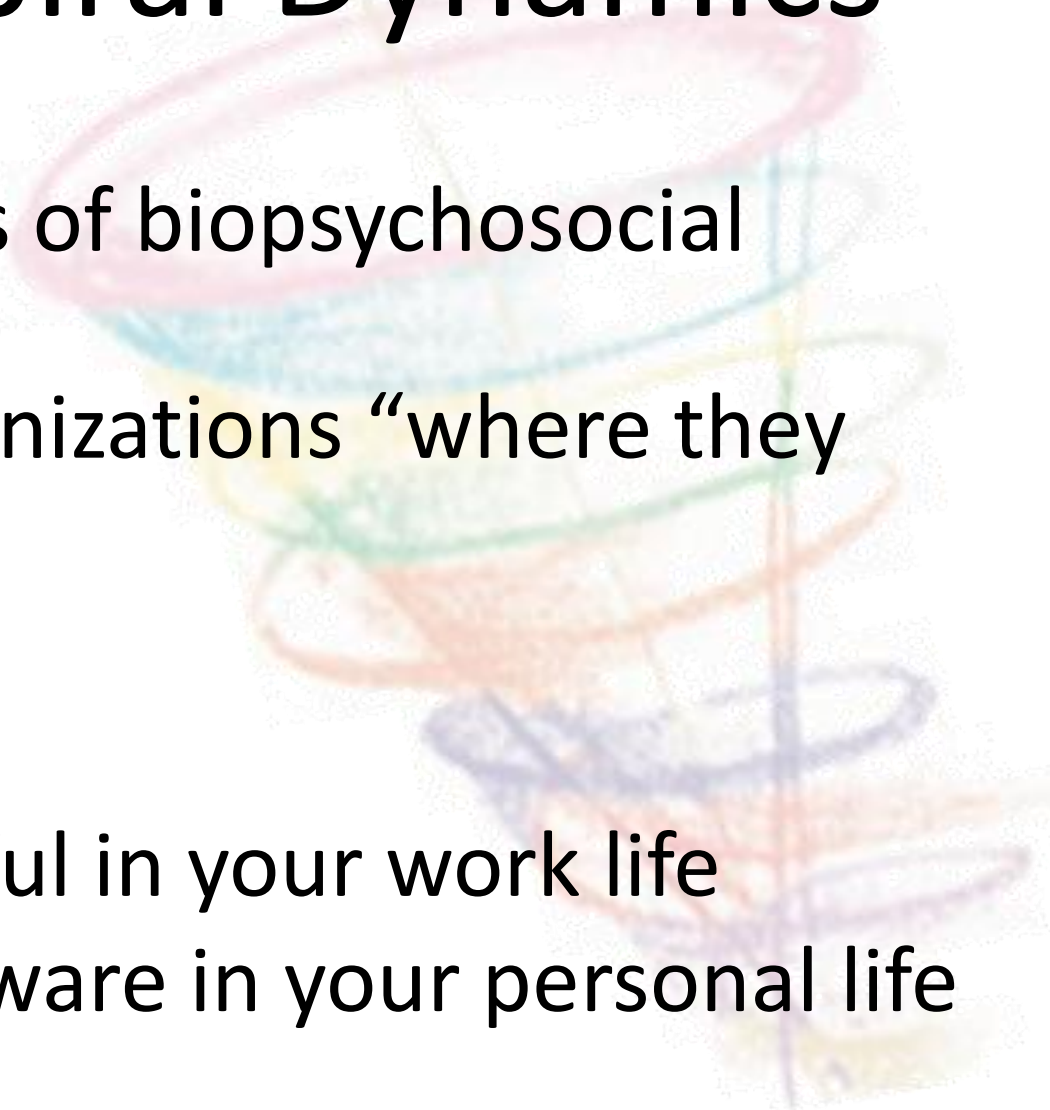
John Hughes

Integral Agile Series: Spiral Dynamics



Why Learn About Spiral Dynamics

- Learn developmental altitudes of biopsychosocial maturity and complexity
- Meet people, teams, and organizations “where they are”
- Know “where you are”
- Be more effective and impactful in your work life
- Be more understanding and aware in your personal life



Challenge of Vertical Learning

- The psychology of the adult human being is an unfolding, ever-emergent process marked by subordination of older behavior systems to newer, higher order systems
- The mature person tends to change his psychology continuously as the conditions of his existence change.
- When a person is centralized in one of the states of equilibrium, he has psychology which is particular to that state. His ***emotions, ethics*** and ***values, biochemistry,*** state of ***neurological activation,*** learning systems, ***preference for education, management*** and ***psychotherapy*** are all appropriate to that state.
- Thus, he would respond most positively to education, management, and therapy which is congruent with that state. And he would have to respond negatively to forms of education, management and therapy not appropriate to the state of his centralization.

The Spiral

Spiral Dynamics (SDi) is a theory of human development introduced in the 1996 book *Spiral Dynamics* by Don Beck and Chris Cowan.



SDi is an extension and elaboration of the biopsychosocial systems concept originated by the late [Dr. Clare W. Graves](#) of Union College, New York

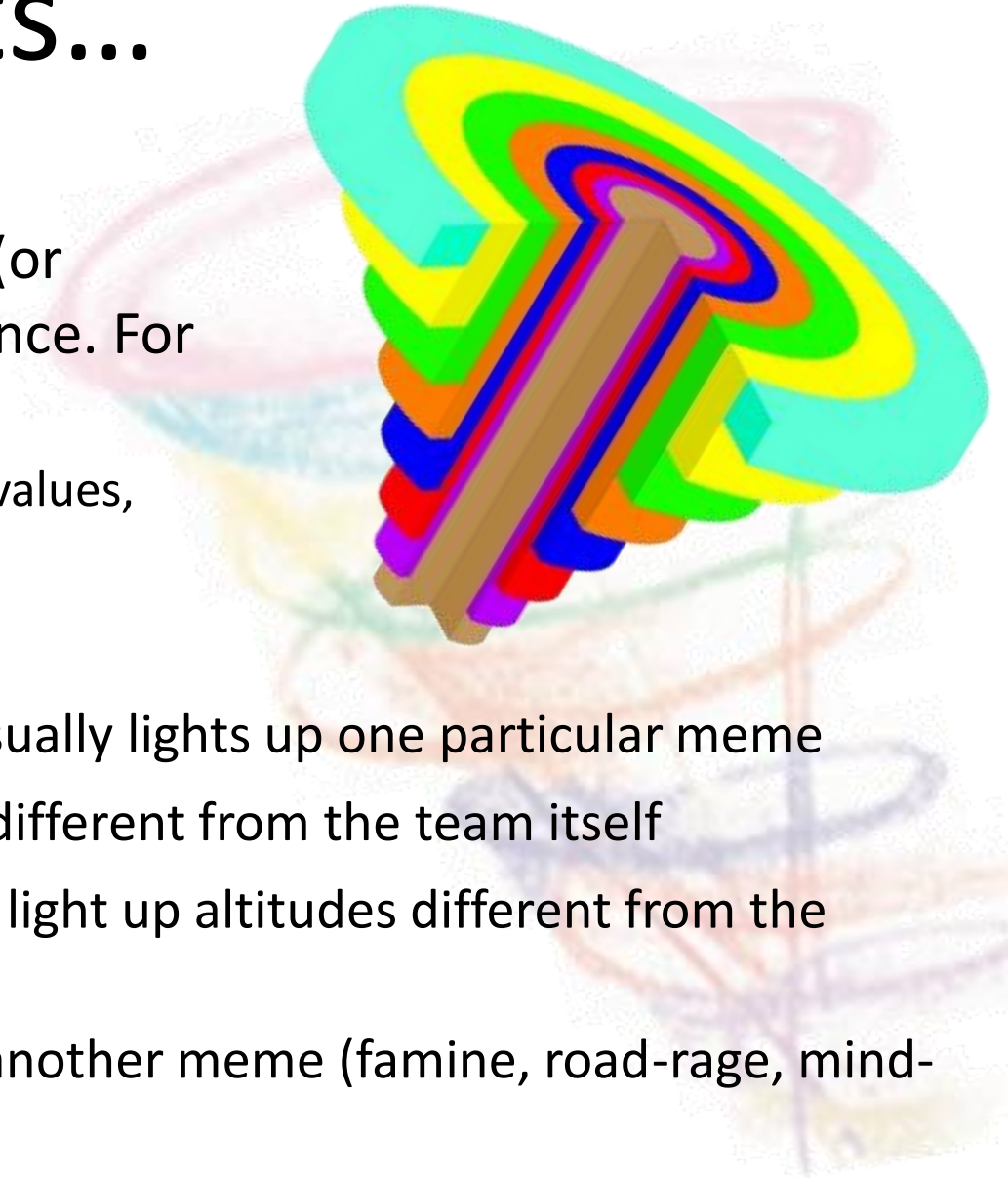
Since the death of Graves, Beck and Cowan have enhanced the theory by drawing from the fledging science of Memetics, the study of "memes."

Spiral Dynamics argues that human nature is not fixed: humans are able, when forced by life conditions, to adapt to their environment by constructing new, more complex, conceptual models of the world that allow them to handle the new problems. Each new model (altitude) transcends and includes all previous models.

It is concerned with why we cooperate, collaborate and come to conflict over differences in values and the deeper value systems that form them.

Fun Facts...

- Each altitude (or meme) includes all below it
- An individual often “lights up” different memes (or worldviews) in different areas of human experience. For example:
 - a person may hold **Purple** ‘traditional-driven’ family values,
 - and **Orange** ‘success-driven’ professional values,
 - and **Blue** ‘order-driven’ political values.
- That being said, a person, team, or organization usually lights up one particular meme
- Teams can have individuals that light up altitudes different from the team itself
- Organizations can have teams and individuals that light up altitudes different from the organization itself
- Specific situations can cause a temporary shift to another meme (famine, road-rage, mind-altering substances, etc.)



Managing Complex Systems through Spiral Wizardry

Spiral Wizards instinctively roam over vast landscapes (and mindscapes) seeing patterns and connections others do not notice because their old-paradigm, "first tier" filters do not allow them to.

They can move through the spine of the Spiral awakening, unblocking, empowering or repairing each of the memes (genetic or cultural codes) of an organization.

He or she appreciates chaos and thinks more like a creative designer than a re-engineer.

The process links functions, people and ideas into new, more natural flows that add precision, flexibility, rapid response, humanity and fun to getting the work done.

That is the power of new paradigm, "second tier" thinking, to constantly survey the whole while tinkering expertly with the parts.

Monitoring the full Spiral is especially vital during periods of large-scale turbulence and change, like right now.

Becoming a Spiral Wizard

Spiral wizards also know that there is no single best way to learn, or to develop.

"BEIGE" survival oriented learning is INSTINCTUALLY, by varying the intensity of stimulation of the senses.

"Purple" learning is stimulated CLASSICALLY through modeling, repetition, rhythm and storytelling.

"Red" CONDITIONED learning is stimulated by hands-on activity accompanied by immediate, external reinforcement.

"Blue" so-called AVOIDANT "book learning" is oriented towards content and facts, rather than towards process and ideas, and is reinforced by standardized testing, by guilt, and by punishment for mistakes.

"Orange" EXPECTANCY learning is geared towards real life experience, trial-and-error experimentation, competitive games, case studies, and simulations.

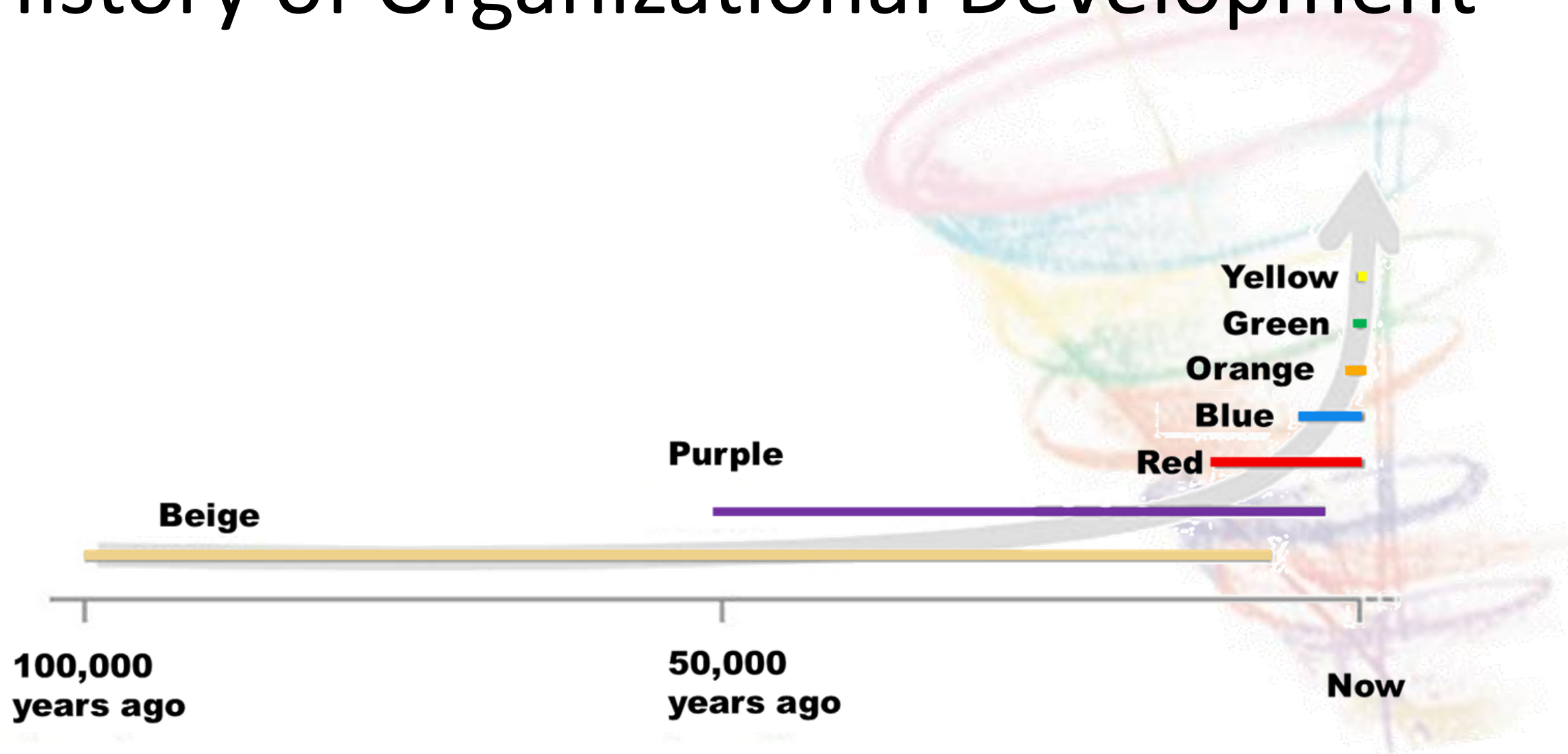
"Green" OBSERVATIONAL learning is stimulated by reflection, observation, interaction, and attention to feelings as opposed to merely dry content.

Moving on towards the Second Tier, we find that "yellow" INFORMATIONAL learning is self-paced, and tailored towards the needs of the particular individual. Rewards are intrinsic rather than extrinsic, and discovery based learning overtakes programmed knowledge.

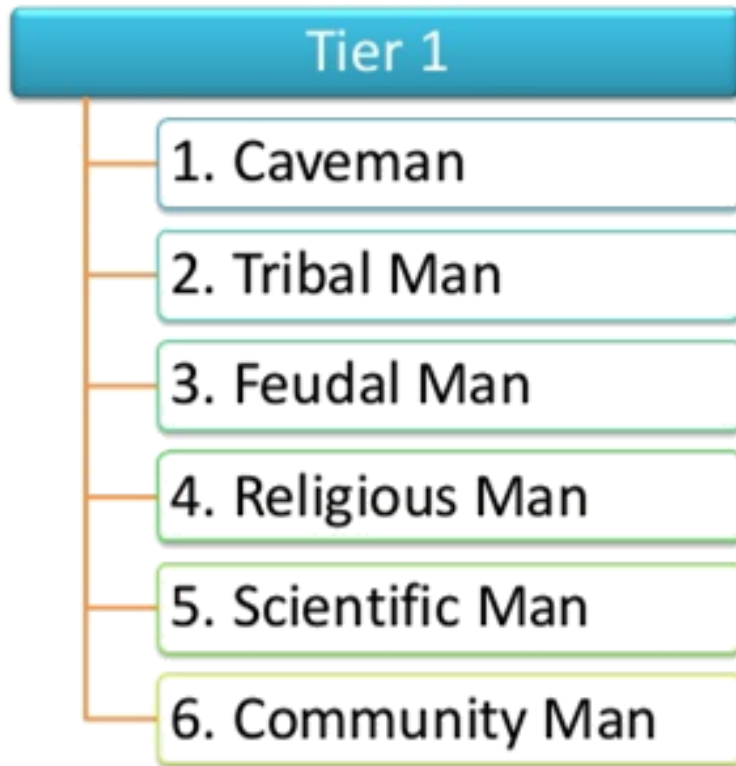
"Turquoise" EXPERIENTIAL learning takes place in communal networks - both social and electronical - involving a deeply felt sharing of consciousness.

So the Spiral Wizard, in the final analysis, is able to create a learning environment that befits a wide variety of styles. This leads onto "Spiral alignment".

History of Organizational Development



Tier Values Evolutionary Framework



1 = Beige

2 = Purple

3 = Red

4 = Blue

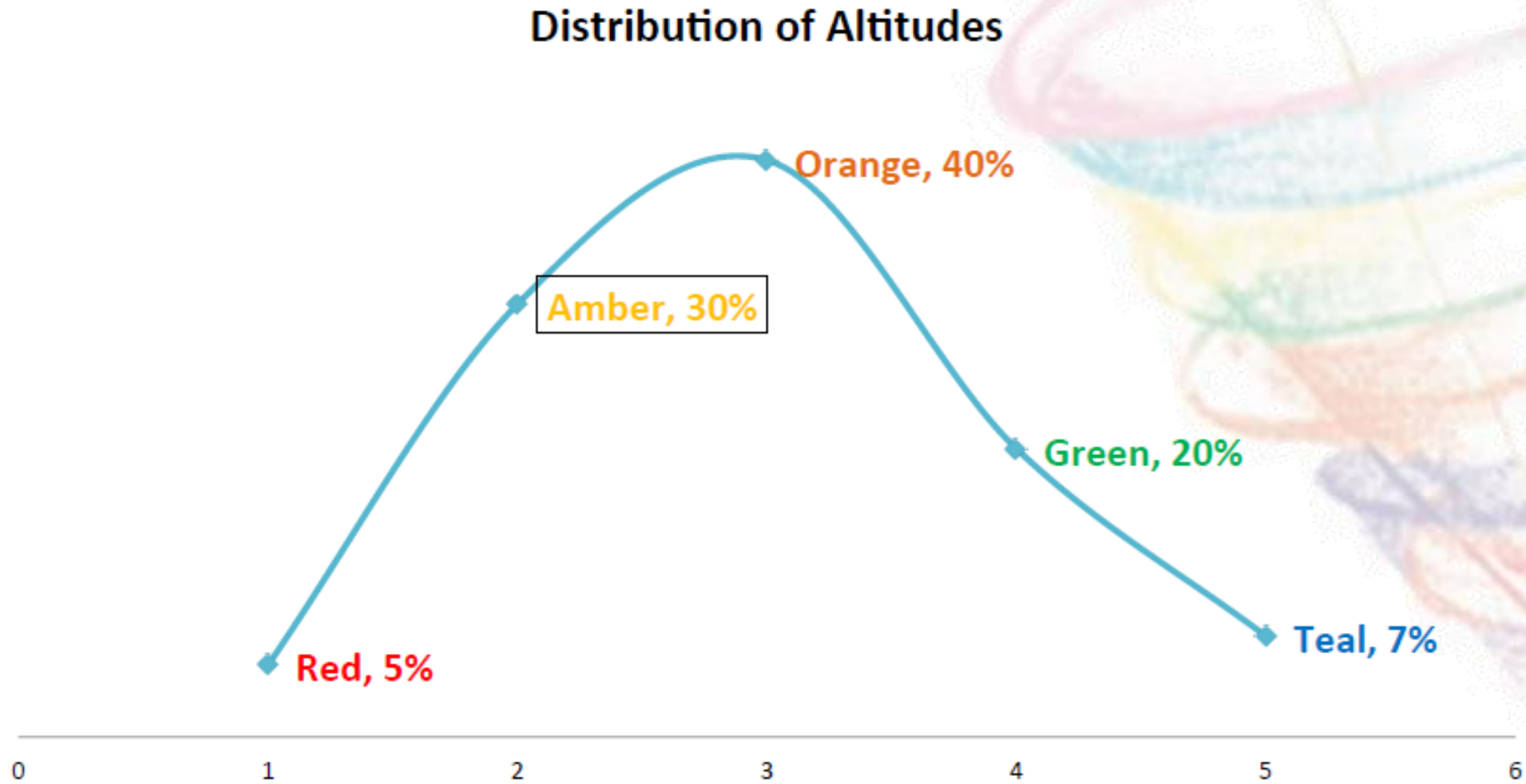
5 = Orange

6 = Green






7 = Yellow

8 = Turquoise

Modern-day Altitude Distribution



Overview

	Explanation	Current Examples	Key breakthroughs	Guiding metaphor	
RED Organizations	Constant exercise of power by chief to keep troops in line. Fear is the glue of the organization. Highly reactive, short term focus. Thrives in chaotic environment	<ul style="list-style-type: none"> •(some) Startups •Mafia •Street Gangs •Terror Organizations 	<ul style="list-style-type: none"> •Division of Labour •Command authority 		← Wolf pack
BLUE Organizations	Highly formal roles within a hierarchical pyramid. Top down command and control (what and how). Stability valued above all through rigorous processes. Future is repetition of the past.	<ul style="list-style-type: none"> •Catholic Church •Military •Governmental Organizations •Public School System 	<ul style="list-style-type: none"> •Formal roles (stable and scalable hierarchy) •Processes (long term perspectives) 		← Army
ORANGE organizations	Goal is to beat the competition; achieve profit and growth. Innovation is the key to staying ahead. Management by objectives (command and control on what; freedom on the how)	<ul style="list-style-type: none"> •Multinational companies •Charter Schools 	<ul style="list-style-type: none"> •Innovation •Accountability •Meritocracy 		← Machine
GREEN organizations	Within the class pyramid structure, focus on culture and empowerment to achieve extraordinary employee motivation	<ul style="list-style-type: none"> •Culture Driven Organizations (NGO's, Southwest Airlines, Ben & Jerrys, Semco) 	<ul style="list-style-type: none"> •Empowerment •Values-driven culture •Stakeholder model 		← Family
Yellow Organizations	No one is the boss of anyone else. Hierarchy is not powerful enough to face complexity, e.g. global economy, human muscle brain (cells). If you take your purpose seriously there is no competitor by definition	<ul style="list-style-type: none"> •Network Organizations (Burtzoorg, ESBZ, Zappos, Semco, A.W. Gore, Automattic) 	<ul style="list-style-type: none"> •Self Management •Wholeness •evolutionary Purpose 		← Network

Self (I) (thinking)	Color	Culture Type (WE)	Online	Orientation - Behaviors	Motivation
Instinctive (autistic)	Beige	Archaic	100,000 yrs	Wild - food, water, shelter, safety, sleep, mating <i>Lives for survival</i>	Survival
Magical (animistic)	Purple	Animistic / Magical	40,000 yrs	Tribal - family, tribe, rituals; respect elders, ancestors, spirits <i>Lives for past</i>	Tradition, avoiding angering gods
Egocentric / Impulsive (egocentric)	Red	Magical- Mythic	10,000 yrs	Exploitative - power-driven, privilege, gang mentality <i>Lives for now</i>	Power, fear of shame
Mythic / Conformist (absolutistic)	Amber (Blue)	Literal-Mythic	4,000 yrs	Truth – purpose-driven, authoritarian , obedient, disciplined, dogmatic <i>Lives for future</i>	Order & meaning; avoiding guilt
Achiever (materialistic, empirical)	Orange	Scientific- Rational	300 yrs	Entrepreneurial - strategic, competitive, success-driven, acquisitive, freedom-loving <i>Lives for gain</i>	Adequacy, competency
Sensitive / Affiliative (humanistic)	Green	Pluralistic / Relativistic	120 yrs	Community - harmony, growth, equality, relativism <i>Lives for a cause</i>	Affiliation, belonging
Autonomous / Authentic (systemic)	Teal (Yellow)	Holistic / Systemic	Now 70 yrs	Systemic - spontaneity, adaptive, competence, integrates systems, <i>Lives for synergy</i>	Autonomy, mastery

Beige

- Semi-Stone Age not generally that active today
- Dominated by nature and basic survival instincts, acting much as other animals
- Results in loose, clan-based survival groups
- Famine might result in large numbers of people arrested in this mode
- Seen in: newborns and senile elderly, mentally ill street people, people in starvation, late-stage Alzheimers, .1% of population

Purple

- **Tribal** - Animistic, magical, spiritistic, close to the earth, cyclical outlook
- Leads to tribal groupings, focus on rituals to appease ancestral spirits
- Blood bonds are strong
- Management of PURPLE demands respect for clan rules and allegiances, respect to the clan "leaders"
- Rewarding someone too visibly can break the group bond with negative consequences
- Change must be embodied in rituals, traditions, and symbols
- Seen in: guardian angels and voodoo-like curses, blood oaths, lucky charms, superstitions, athletic team bonding, 10% of world population, 1% of power

Red

- **Exploitative** - Rough and harsh, rugged authoritarianism
- Finds expression in slavery or virtual slavery
- Exploitation of unskilled labor
- Generally run by a Top Boss and series of proxies
- Strict division of have's and have not's
- Assumption is that people are lazy, must be forced to work
- True leaders must suppress natural human tendencies
- Currently evident in street life and gangs in inner cities
- Motivated by "heroes" and conquest. Feudalism.
- Seen in: Terrible Twos, feudal kingdoms, soldiers of fortune, many rock stars, rebellious youth, 20% of world population, 5% of power



Blue (Amber)

- **Authoritarian** - Loyal to Truth, which is defined by social grouping
- Purposeful and patriotic, leads people to obey authority, feel guilty when not conforming to group norms, try to serve the greater good through self-sacrifice
- Works very well in industrial economies
- Discipline is strict but usually fair and often public (flogging in Singapore, e.g.)
- U.S. has shifted away from BLUE industries, which have moved to Mexico, Taiwan, Malaysia, and elsewhere that this BLUE is now strong
- BLUE industries will eventually move to Africa, in Beck's opinion
- Moralistic-prescriptive management techniques
- Organizational structure is pyramidal
- Seen in: Boy and Girl Scouts, Billy Graham, Puritan American, Confucian China, Islamic fundamentalism, 40% of world population, 30% of power

Orange

- **Entrepreneurial** - Personal success orientation, each person rationally calculating what is to their personal advantage
- Motivations are largely economic, people are responsive to perks, bonuses, money rather than loyalty, group belongingness, or life employment
- Rational capacities allow people to test many options
- Competition improves productivity and fosters growth
- This is probably the dominant meme in America today
- Main concerns are autonomy and manipulation of the environment
- Usually results in free market economy and multi-party democracy
- Seen in: Wall Street, Rodeo Drive, cosmetics industry, Dallas, trophy hunting, Hong Kong, GQ, Mediterranean yachts, 30% of world population, 50% of power

Green

- **Communitarian** - Sensitive and humanistic, the focus with green is community and personal growth, equality, attention to environmental concerns
- Work is motivated by human contact and contribution, learning from others
- Being liked is more important than competitive advantage, value openness and trust, fear rejection and disapproval
- Leaders become facilitators, less autocratic
- Hierarchies blur in the move towards egalitarianism with a resulting tendency towards inefficiency and stagnation
- Can become so bogged down and ineffectual, though, that people revert to go-getter individualism of orange
- Seen in: Rogerian counseling, Esalen, GreenPeace, Jacques Costeau, Jimmy Carter, John Lennon's music, Doctors without Borders, ACLU, Ben & Jerry's, animal rights, deep ecology, 10% of population, 15% of power

Yellow (Teal)

- **Systemic** - This is the first meme of the second tier in which there is a quantum shift in the capacity to take multiple perspectives in life
- YELLOW is motivated by learning for its own sake and is oriented towards integration of complex systems
- Change is a welcome part of the process in organizations and life; YELLOW likes the challenges
- It is characterized by systems thinking, an orientation to how parts interact to create a greater whole
- Unique talents and dispositions are honored as contributing something valuable to the whole
- YELLOW likes engineering complex systems and dealing with ideas
- It is also ecologically oriented, but in a more subdued, behind the scenes way
- YELLOW thinkers often work on the periphery of organizations, quietly fine-tuning situations and procedures, much to the bafflement of the first tier memes
- Seen in: Hawking's Brief History of Time, chaos theory, eco-industrial parks, Wired magazine, 1% of world population, 5% of power

Turquoise

- **Holistic** - Focused on a global holism/integralism, attuned to the delicate balance of interlocking life forces
- Synthetic and experiential, emerging focus on spiritual connectivity
- Work must be meaningful to the overall health of life
- Feelings and information experienced together, enhancing both
- Able to see and honor many perspectives, including many of the "lower" memes
- Structured in multi-dimensional ways
- Conscious of energy fields, holographic links in all walks of work and life, urge to use collective human intelligence to work on large-scale problems without sacrificing individuality
- Seen in: Gaia hypothesis, Ken Wilber's work, Teilhard de Chardin, David Bohm, McLuhan's 'global village,' Gandhi's idea of pluralistic harmony, not very influential yet, .1% of world population, 1% of power

Within each meme people have different values, different ways of thinking and acting, and a different sense of life meaning

Meme	People Value	People Do	Meaning of Life
Beige	Instinct, Survival, Food, Warmth	What is natural according to instincts	Do what you must to stay alive
Purple	Kinship, Magic, Safe living	What is traditional or what their group does	Keep the spirits happy and the tribe/group safe
Red	Egocentric, Impulsive, Status, Power	What is good for them and gives them control	Be what you are and do what you want
Blue	Stability, Order, Ultimate Peace	What is right according to the rules and Laws	Life has purpose with predetermined outcomes
Orange	Scientific, Strategic, Material	What gets results or puts one ahead	Play the game to win
Green	Sensitive, Humane, Affectionate relations	What is caring to meet the needs of others	Seek inner peace and care for others
Yellow	Integrative, Whole Person, Synthesis	What is good for all systems	Live fully and as responsibly as you can
Turquoise	Holistic, Being, Wisdom	What is wise according to deeper insight	Wholeness of mind and spirit

A memetic perspective can clarify different approaches to empowerment, and value them all

Meme	Needs	Learning/Teaching Styles
Beige	Find what you need	Instinctual learning, automatic responses
Purple	Petition the gods with ritual	Reassurance, repetition, honour group customs
Red	Align with those in power to get your needs	Reinforcement, power relations, individual learning, rewards
Blue	Follow the rules, don't exceed roles	Authoritarian, order and discipline, right answers
Orange	Excel, set goals, measure success	Build autonomy, risk taking, competition, enterprise
Green	Appreciate diversity, seek consensus	Collaborative learning, respect for other's views, equity
Yellow	Integrate diversity with discernment, wholeness	Interdisciplinary learning, freedom to be and discover
Turquoise	Peaceful expression of a multidimensional self	Holistic/Integral learning, inner wisdom

Different memes/worldviews are also associated with particular needs and learning and teaching preferences.

Personality

RED	<i>Express self, to hell with others</i> aggressive, heroic, exploitative, no worry or guilt
BLUE (Amber)	<i>Sacrifice now to get reward later</i> denies self, higher absolute authority, rewards later, dogmatic
ORANGE	<i>Express self calculatedly with little shame or guilt</i> get what self desires without undue reaction from others
GREEN	<i>Sacrifice self now to get reward now</i> denies self, values others to get approval & satisfaction now
YELLOW (Teal)	<i>Express self but not at the expense of others</i> non-dogmatic, express self but never at the expense of others

Culture Type

RED	<ul style="list-style-type: none">• Mythical – Magic• Kings and heroes
BLUE (Amber)	<ul style="list-style-type: none">• Literal – Mythic• Formal, role---based• Agile by Edict
ORANGE	<ul style="list-style-type: none">• Scientific – Rational• Competitive, Profit---driven (obsessed)• Team owns <u>work</u> (as long as the business goal is met)
GREEN	<ul style="list-style-type: none">• Pluralistic / Relativistic• Values---driven• Teams own <u>results</u>• Participative, consensus• Family “feel”
YELLOW (Teal)	<ul style="list-style-type: none">• Holistic / Systemic• Self-organized teams• Purpose-driven culture• True Meritocracy

Organizational Structure

RED	<ul style="list-style-type: none"> Strong man rule, empire 	Generally run by a Top Boss and series of proxies, strict division of have's and have not's	
BLUE (Amber)	<ul style="list-style-type: none"> Pyramid, hierarchy, Authority structure 	More than one pyramidal system – some isolates	
ORANGE	<ul style="list-style-type: none"> Functional units, Strategic Enterprise Matrix structure with empowered customer Management By Objective & “rank & yank” Look for “pain” 	Big wheel type = power figure directly controlled all others	
GREEN	<ul style="list-style-type: none"> Social network, Circle Flat org structure Performance Reviews done by Teams Policies on rights of workers Theory of Constraints 	More than one flat type organization based primarily on previous acquaintanceship	
YELLOW (Teal)	<ul style="list-style-type: none"> Evolving around needs Innovative org structure Holacracy, lattice Team Coach role with no Authority 	Revolving type organization leader, change based on knowledge	

Management Style

	Management Style	How People Want To Be Managed
RED	<ul style="list-style-type: none">• Exploitative	<ul style="list-style-type: none">• Paternalistic
BLUE (Amber)	<ul style="list-style-type: none">• Paternalistic Style• Mainly Reactive / Expert leadership	<ul style="list-style-type: none">• Consultative
ORANGE	<ul style="list-style-type: none">• Consultative Style• Reactive (Expert, Achiever) leadership• Tactical Intro of Coaching competency for goal Clarification	<ul style="list-style-type: none">• Participative
GREEN	<ul style="list-style-type: none">• Participative Style• Emerging Creative• Achiever & Catalyst leadership• Coaching competency for growth of Self	<ul style="list-style-type: none">• Facilitative
YELLOW (Teal)	<ul style="list-style-type: none">• Facilitative Style• Creative (Catalyst & above)• Coaching (multidimensional)	<ul style="list-style-type: none">• Systemic

Example Organizational Comparison

Function	Traditional (Orange) Organizations	Emerging (Teal) Organizations
ORGANIZATION	Hierarchical pyramid	Self-organizing teams; coaches with no mgmt authority
PROJECTS	Heavy project management methods	No project mgrs; people self-staff projects
RECRUITMENT	Interviews by HR to match with job description	Interviews by future team members
JOBS	Each has own description & job title	No job titles; fluid, granular roles
PERFORMANCE MANAGEMENT	Focus on individual performance; appraisal by supervisor	Focus on team performance; peer appraisals
PROMOTIONS	Jockeying for position, politics	No promotion, roles fluidly rearranged with peer agreement

Agile At Different Altitudes

- Iterative development
- “Simplistic” Kanban

BLUE – Tradition-Driven Agile

- Loves detailed processes
- Inherently violates spirit of Manifesto (or they’re not Blue)
- Management will struggle with self-organization
- Possible benefits: iterative, customer focus, quality, speed, small, local process improvements
- Kanban may be a better fit culturally

Manifesto Alignment

Comprehensive documentation over **working software**

Following a plan over **responding to change**

Processes & tools over **individuals & interactions**

Agile At Different Altitudes

- (partial) Lean Startup
- Kanban-cycle time
- Results-driven Scrum

ORANGE – Results-Driven Agile

- Results; Save Money; Do more with less; Nominal customer satisfaction
- Competition for recognition more than teamwork
- Engineering Practices – measure business goals
- Management may use metrics to compare teams
- Excellence thru technical practices

Manifesto Alignment

Contract negotiation over **customer collaboration**
Working software over comprehensive documentation

Agile At Different Altitudes

- Team-oriented practices
- Lean Startup practices
- People-driven Scrum

GREEN – People-Driven Agile

- Focus on people and underlying values
- Real empowerment for teams
- Likes owning their estimates and making technical decisions
- Like flat organizations
- Morale goes up
- Consensus resonates; downside = “death-by-consensus”
- True customer partnerships possible

Manifesto Alignment

Individuals & Interactions over processes and tools
Customer Collaboration over contract negotiation

Agile At Different Altitudes

- Lean Startup / Customer Development
- Software Craftsman
- Fluid code ownership
- Unique solutions

YELLOW – Adaptive-Driven Agile

- Whole system view and systems thinking, embraces complexity
- Processes and systems support “Flow”
- Rotating leadership and dropping of role is natural
- Values effectiveness over efficiency for all stakeholders
- Full blown Agile is possible

Manifesto Alignment

Responding to change over following a plan

Where To Go For More

- HERE!!! → Integral Agile Series continues with Integral Theory next
- Spiral Dynamics by Don Beck and Christopher Cowan
- The Never Ending Quest by Christopher Cowan and Natasha Todorovic
- Reinventing Organization by Frederic Laloux
- A Theory of Everything by Ken Wilber
- Creating the Agile Enterprise by Michael Spayd (*Coming Soon*)
- <http://spiraldynamics.org/>
- <http://integral-agile.com/>
- http://www.reinventingorganizationswiki.com/Main_Page
- <http://www.agilecoachinginstitute.com/integral-agile/>