THE OPEN ORGANIZATION FIELD GUIDE

Practical Tips for Igniting Passion and Performance

A community-produced companion to *The Open Organization*

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Contents

Part III: New Contexts

Preface

Bryan Behrenshausen, Red Hat

Jim Whitehurst published *The Open Organization* on June 2, 2015. He didn't just launch a book. He initiated a conversation.

For six straight months, that conversation has been lively and enlightening, as readers grappled with Jim's assertion that today's leaders could apply open source principles to the problems and practices of management to achieve astounding results.

Of course, associates at Red Hat—the open organization Jim leads—shared their own experiences in support of Jim's belief (after all, they're living proof of it). But other voices joined the dialogue, too. Authors, thinkers, and managers from all over the world chimed in. They discussed and debated. They tweeted. They evangelized.

A community formed.

Opensource.com has functioned as a proud host to that community, publishing (every week!) new stories about the ways our workplaces can become more transparent, more meritocratic, more responsive, more engaged—in short, more *open*. Those stories both affirmed and challenged Jim's ideas. They pushed them in new directions, gave them broader purchase.

So we've collected some of the very best into this collection, which celebrates half a year of sharing and learning. It contains three sections. The first, "Stories from the Trenches," features tales from managers and other leaders working to open their organizations. They shared invaluable lessons with us. Part II, "Engagements," features writing that clarifies, extends, and challenges Jim's message. And the final section, "New Contexts," illustrates ways open principles can make a difference in organizations that aren't corporations.

The result is an important extension of Jim's initial contribution. Embracing the open source spirit, it builds on what he started and enhances it, turning it into a *community effort.*

In open organizations, Jim writes, "feedback is a gift." Anyone who's read his book should consider this volume a gift from a community passionate about the power of open principles to change the way we work, manage, and lead.

Foreword

Brook Manville, Brook Manville LLC

Reading Jim Whitehurst's *The Open Organization*, you can hear the voice of a leader on a mission. Achieving a well-described personal transformation to become the Red Hat CEO, Whitehurst chronicles his leadership journey of the last few years, increasingly believing that the "open organization model" he encountered (and then further developed with other Red Hatters) has the potential to become a "new management paradigm." The book further argues that reframing leadership as "engaging and catalyzing participative communities both inside and outside" has helped Red Hat better achieve all-important performance imperatives of speed, agility, and innovation, and that the open model could be applicable to other organizations too—enabling them similarly to achieve higher performance. The essays in this volume, plus the growing contributions to the "movement building" website Opensource.com, reflect a high level of enthusiasm and interest among many other practitioners for exploring further the practice of "open organization."

Tradition, progress, and key challenges

But like any movement on the rise, this one might benefit from some cautionary context. Leaf through most management books of the last thirty years, and you'll find narratives similar to those now surrounding the open organization. They tend to assume this general form: "The world is now facing an unprecedented magnitude of change. The situation calls for wise leaders to get ahead of the curve—by pursuing some new revolution of organization, practice, or strategy. Let me thus describe a personal, positive experience with the new approach that I've had; and let me amplify it by offering some how-to suggestions for joining this revolution. I can also offer a few illustrative case examples to help encourage you, dear reader, to take the plunge too."

Dismissing the open organization as just another version of this familiar management research story might seem easy. But we shouldn't be too quickly cynical. After all, the standard expositions of "new and better way of working" map to how much of human progress actually occurs. At the same time, however, we should challenge any new version of the story with a few hard questions. Specifically: is open management really something new and game-changing, or just yesterday's "revolution," dressed up in different clothes? Is its "solution" a one-shot idea or something really applicable to a broad variety of business challenges? And will the recommended approach indeed bring a quantum leap of effectiveness and performance—enough to justify adoption and (inevitably) the cost and pain of changing how a (currently non-open) company does its business?

How new is 'open'?

As for the first question—"Is this really new?"—many open organization ideas have popped up, here and there, in research and best practice prescriptions of the last many years. The "Knowledge Revolution" that Peter Drucker and others first articulated in the 1980s started the march towards flatter, more empowered organizations, more democratic processes (especially in services firms), and more inclusive decision-making. The "discovery" of the value of high performance teams and cross-silo collaboration has matured from anti-hierarchical innovation in the 1980s and 90s to increasingly common practice in most best-of-class organizations.

Similarly, the "open book management" Jack Stack initiated during the same era has built a growing acceptance of greater participative transparency in the workplace; self-governing initiatives in different pioneering organizations like W.L. Gore and others have demonstrated how meritocracy produces both higher engagement and better operating results. As Jason Baker's essay in this volume also points out, many of the open management principles can actually be found in the charters of 19th century cooperative organizations. And, as Jim Collins and others have ably demonstrated for years, the power of employee engagement and passion in distinguishing "great" from "merely good" organizations.

All that said, just because certain ideas have been around for a while doesn't mean they should be discarded or discounted. Whitehurst generously acknowledges the tradition behind much of the open organization framework, and makes no claim for "first ever" invention of its various principles. And, of course, open management is itself a descendant of the open source software movement, on which companies like Red Hat trade.

Adaptive relevance

What is perhaps new—and so Whitehurst's book implies—is the combination of the various principles, and their seeming adaptive relevance as a coherent habit of practice and thought in a world that really now differs from the operating environment of even ten years ago: more-than-ever competitive, more-than-ever interconnected in networks, and more-than-ever putting a premium on specialized, collaboration-seeking digital-native talent who expect greater autonomy and responsibility for their own work and decisions.

Not surprisingly, the life span of traditional organizations and their leaders' tenure is shrinking. In the dust and ashes of accelerating creative destruction, new business models are rising almost weekly, most of which in some form or other point towards—or even embrace—open management kind of ideas: enterprises that are "crowd sourced" and build value through open communities (e.g. Github, Kickstarter, Wikipedia, Top Coder, etc.); platform companies like Task Rabbit, Uber, and others which operate as markets or communities of networked, meritocratically empowered entrepreneurs or volunteers; product companies that co-create offerings with customers (e.g. network companies like Threadless but also now many Fortune 500 companies too), drawing on passion and collaboration across boundaries; ecosystems of collaborating partners (e.g. in education, environmentalism) that thrive on inclusive decision-making and self-governing principles. Plenty of companies and other enterprises are thriving today without being really "open"—but change is in the wind, and any new model that seems to offer greater speed, innovation, and engagement of top talent must be seriously weighed for its potential as a new "best practice."

Frontiers of application and performance

That said, whether this open management paradigm is really new, newly assembled, or just newly suited to a new operating environment at a certain point becomes merely an academic question. My own guess would be "some combination of all three." Much more important, however, are the second and third questions posed above: Does the approach drive better performance in a wide range of applications and endeavors across our society and economy?

Here, Whitehurst's book and the essays of this volume show promising signs of positive answers, but (appropriately) with less certainty and detail than a fully developed new management system would require. *The Open Organization* references several other organizations successfully working "open," and several essays following here (e.g. by Fielkow, Branon, Hilliger, Watkins) illuminate how some or several of the open principles are changing for the better work in enterprises beyond Red Hat. Other essays (e.g. by Hibbets, Savage, and Wike Huger) offer more granular discussion of open practice at Red Hat itself. But more disciplined and extended analysis, both at Red Hat and across more non-software examples are still necessary.

As a movement, open management is gaining adherents, generating passion among practitioners, and pointing the way towards working smarter and more agile in many arenas. But it has not yet achieved the kind of crisp articulation and replicable recipe that would scientifically demonstrate the kind of taken-for-granted value that hierarchically structured business organizations of the last generation have established. Yes, everybody knows that Alfred Chandler-style command-and-control is becoming less and less effective in our new networked world—but the jury is still out whether open management will achieve the durable and unquestioned status as its widely accepted successor someday.

But neither Jim Whitehurst's book nor this volume of essays is yet making that assertion. The open management movement's collective claim remains suitably modest—essentially: "Here's something that really seems to work in various situations we know, and seems to fit pretty well the new way organizations have to work. But there's more to learn." One of the great strengths of this movement—true to its own principles—is a rooted understanding that progress is evolutionary, that the crowd, not any single or limited set of gurus, will shape the ethos and practices of the "better way of working." Better practice will become clearer over time, but with no pre-determined path or necessary endgame as a goal. Whitehurst authentically acknowledges that, despite the successes of the approach developing at Red Hat, he's also encountered plenty of learn-by-doing failures, and that for all of his understanding, open management remains "a work in progress."

And thus this volume. The collective spirit of the essays that follow is consistently that of explorers and tinkerers in search of progress, not zealots or absolutists preaching the final sermon. Open management, as Bryan Behrenshausen's essay reminds us, stands on the shoulders of the philosophy that gave rise to the Internet itself: "everything is a request for comment." The next success horizon for the open management movement will be developing more case examples and analysis of performance mechanisms—but also more detailed synthesis of the next round of questions to be explored by active and would-be practitioners.

With that agenda and hope in mind, please now read on.

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Part I: Stories from the Trenches

The open organization on main street

Brian Fielkow, Jetco Delivery

I had the opportunity to speak with Jim Whitehurst, Red Hat CEO and author of *The Open Organization*, about his book. Because I also believe that a healthy culture is at the cornerstone of a successful business, Jim and I share a lot of the same philosophies, and he helped me see more clearly that the concept of an open organization is the model that drives employee engagement, growth, and continued improvement.

Our conversation focused specifically on how the ideas in his book apply to entrepreneurial and “main street” businesses, which describes my own business, Jetco Delivery, a freight and logistics company based in Houston, Texas. Business books too often contain great ideas, but the ideas can be very difficult for many companies to integrate. Talking with Jim about his concepts and *The Open Organization* was refreshing. Red Hat's business model is the blue print for the future company, regardless of an organization's size.

Bring your front-lines in

Employee passion and engagement is essentially what leads to customer satisfaction, and the traditional “top down” business model, centered around hierarchy and dictating from the top, is out-of-date. I can admit that the trucking industry (and many other “old economy” businesses) is often behind when it comes to this kind of thinking. Many times, employees are siloed—you are either an office employee or a driver—and the two rarely interact in meetings or when it comes to making decisions for the company as a whole.

I can attest that open organization concepts helped in transforming our business. Our drivers are our front lines, therefore making them the eyes and ears of our company. So it's essential that they are part of our decision-making, bring us their ideas, and know that they are included in what happens at the company. In 2013, we created a Driver Committee, which consists of drivers elected by their peers. Of course we had our share of naysayers who believed that what we were actually creating was a union. Call it what you want, but it's one of the best decisions we've made. A representative from our Driver Committee is now present at every management and operations meeting, and we've essentially torn down the silos. Jim's concept of an open organization works: No matter the size of the company or the industry, and from my own experiences, it is essential to employee-engagement and ownership.

An office filled with millennials

According to Jim, “The majority of millennials do not want to work for large companies.” In his view, the large company is not the problem; rather, the problem is hierarchy. I can tell you that the trucking industry is not necessarily the most attractive industry to join. Yet, when I look around our office, it is full of millennials, and they're continuing to walk through our door in search of applications. Why? Culture. We have built an all-inclusive, leadership-driven, employee-owned culture, and that's what millennials are after. Business leaders who want to succeed in hiring the best, young candidates will adapt their business structure over time to accommodate unprecedented demand for meaning, flexibility, and engagement in their work.

The 20/60/20 rule

Part of my conversation with Jim focused around the fact that we've both experienced attrition when it comes to implementing fundamental change. Attrition must be expected, and it's what allows you to weed out those who are not on board and in-line with your values. Jim shared that when he led Delta Air Lines through restructuring, his team was required to sign a "Count Me In" agreement, which established the behaviors expected or offered a severance package for those who would not sign. About 20 percent of Jim's team left during the restructuring. I've gone through the same process and like to refer to it as the 20/60/20 Rule. When you begin to embark on change, 20 percent of your team is going to be on board; they see where you're going and they are in support of and trust you. Sixty percent may not be sure about the change, but they are open-minded. As leaders, our job is to win these 60 percent over. The final 20 percent are not on board, and they never will be. For those 20 percent, your job as a leader is to provide them with a smooth transition out of the company. We must work for the 80 percent. Those are our employees who support our culture, who understand the reason for change, and who will work to make the company the best it can be.

Your culture will dictate who stays and who goes

Jim talked with me about old-line thinking that leadership must weed out the bottom 10 percent of employees each year. We agreed that the company's culture will eliminate those particular employees. I can admit that in the past, there have been times when I brought in hired guns to fill a particular need at my company. Although the actual need initially may have been fulfilled, these employees often haven't lasted, particularly when they are not in-line with our culture. An entrepreneurial company will groom leadership around its culture, not the other way around. Hire for values and cultural alignment; the technical skills can be taught.

My conversation with Jim reiterated my belief that a healthy company culture is the foundation of a successful business, and, as leaders, we must be prepared for change and healthy growth while creating a team of empowered employees. I am grateful to have learned from Jim and *The Open Organization*.

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What my conversation with GE taught me about open organizations

Jackie Yeaney, Red Hat

Most people are familiar with university foreign exchange programs, where schools send their star students out into the world to collect experiences and learn beyond their comfort zones. Fewer people probably know that big companies have internal "executive MBA" programs their HR departments develop to help fast-track top performers (we have our own such programs here at Red Hat). Recently, I acted as a subject matter expert for a corporate executive development program with high performing General Electric (GE) executives. The day I spent with these leaders was one of my favorites here at Red Hat, and it dawned on me that this could potentially be a sharing model that Red Hat and others could use more broadly.

These folks were some of GE's brightest talents, tasked with the challenge of understanding how to build "digital DNA" into a hundred year-old company. It was a three-week project GE set up as a tour of various organizations GE felt had mastered the art of building this digital DNA and creating a culture tailored to the millennial generation. The company wanted its emerging leaders to learn everything they could about the way workplaces are changing in the digital age.

So as part of their tour, they stopped by the Red Hat office in Atlanta to learn more about our company's unique culture. When I first received GE's request, I felt baffled that the company thought it had something to learn from Red Hat. The fact that a high-profile company like GE continues to evaluate its corporate culture and is willing to reach beyond its walls really impressed me. It was also refreshing that these leaders were so candid about the challenges GE faces as it evolves from an industrial goods company to something much more.

As luck would have it, I had a handy resource right at my fingertips—my boss's new book, *The Open Organization*! Our CEO, Jim Whitehurst, writes about how open source principles have dramatically altered the future of management and organizational leadership. I gave each of our visitors a copy of Jim's book (as well as Charlene Li's recent book, *The Engaged Leader*), and we began a several-hour discussion, talking openly about the cultures of our two companies.

Sharing stories of everyday life in our organizations was a great way to break the ice. The GE folks and I may have worked in very different places, but we soon discovered we shared similar concerns:

- How do we ensure our companies innovate and respond quickly enough to our fast-paced market environments?
- How can we stay agile so that decision-making doesn't suffer as we continue to grow?
- How do we continue to attract and retain up-and-coming workers who demand more autonomy and purpose at work?
- How do we maintain what we're known for while also being flexible and adaptable for what is coming?

Our conversation was enlightening for both sides. For example, we discussed at length the place and role of metrics in organizations today. We all agreed that becoming obsessed with the most minute details of numbers was a constant danger, especially given the flood of information now available. But our visitors were clearly shocked when I told them Red Hat doesn't track the kinds of metrics GE does. Instead, Red Hat leaders expect associates to define their goals and corresponding metrics, because we trust the judgment of the people closest to the problems we're trying to solve collectively. And we feel associates can make these decisions because we've ensured that they all thoroughly understand the company's mission, purpose, and strategy. I was being completely honest when I told our visitors that I've never lost a wink of sleep wondering whether Red Hatters understand and embrace our mission. That's just something I take for granted in an open organization like ours.

We also discussed the role feedback plays in our decision-making practices. I told GE leaders how lucky I feel to be working closely with associates who'll tell me when something isn't going well (or when they don't agree with me!). I have zero fear that people on my team are just nodding in agreement, or that issues will grow so large that they become extremely difficult to fix. When we have an issue or conflict in Marketing at Red Hat, we tend to set up quick (30-day), cross-functional "tiger teams" to hit the problem straight on. In traditional organizations, mandates and solutions tend to flow from leaders down to their subordinates, whose job is to carry out those mandates—not question them. Today's workforce is smarter than I am; I need their insights and creativity to find the right solutions. And they demand—and deserve—a culture that values their input, not simply their obedience. Open organizations tend to attract this kind of talent, I said.

During the visit, I was actually able to demonstrate firsthand the power of an open organization's collaborative atmosphere. Red Hat CIO Lee Congdon joined me so we could explain how we partnered together as CIO-CMO (an increasingly hot topic these days). We used our joint effort of re-launching redhat.com as a specific example. As anyone who's built something of this size knows, constructing a website like ours involves multiple stakeholders with all kinds of talents. A website needs to be technically sound (well programmed and speedy), but also easy to navigate and beautiful to look at. It should also embody a company's voice and brand. So when we set to work overhauling redhat.com, we formed a collaborative working group composed of experts in both web design and branding. It was another wonderful cross-cultural experience, as designers learned to work according to the principles of agile development, and developers learned to build resources that reflect our brand. We were proud to tell our visitors about such a successful partnership.

In the end, our new friends from GE felt like they'd gleaned some practical tips for continuing to evolve GE's corporate culture. They especially appreciated the way each of *The Open Organization*'s chapters ends with concrete and actionable tips from Jim for making a workplace more open, collaborative, transparent, and meritocratic—all characteristics they'd like to foster in the GE of the future. Shortly after we parted, I received a note from one of the attendees, who thanked me for helping the group explore issues they otherwise "couldn't see by looking in the mirror."

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How I learned the difference between a community and an audience

Phil Branon, Dun & Bradstreet

It's not every day that your CEO gives you a telephone ring, so I definitely remember the day mine phoned me. He'd called to tell me about a puzzling voicemail he'd just received.

I was a consultant for a tech community website and the team was rolling out a major site renovation. Our goal was to modernize the look and functionality of the site and, equally importantly, better monetize it so it could survive and thrive in the long term.

Apparently, however, not everyone welcomed the changes we'd made. In fact, that's why the CEO was calling me: an active and passionate member of the website's community, someone irked by our alterations, had found his home phone number and called him directly to protest. And he wanted me to intervene.

For some time, I'd known that working with audiences for digital websites differed dramatically from working with audiences for more traditional, print publications. In the late 1990s, I was the publisher at InfoWorld. And after that, I worked with the TechRepublic team, where I helped build one of the first community-focused news sites on the Net. I did the same at IT Business Edge, my next venture.

Now here I was again, faced once more with what I'd come to recognize as an incontrovertible truth: When you run a digital publication, you're not simply serving an audience. You're participating in a community.

And that makes quite a difference.

Changing times

In the pre-Internet era, approaching an audience was fairly straightforward. You'd simply select a segment of the market you wanted to reach, choose content that's important to that segment, tailor it for them, and then serve it to them. Publishing veterans know this as the "controlled circulation" method. It's rather scientific and "top-down." Over the years, we'd gotten pretty good at it.

But digital audiences can be vastly different. The ones I'd helped build certainly were. Communities gathered around websites often take responsibility for generating not only the sites' content, but also their rules, norms, and etiquette. They feel intensely invested in the websites' offerings, cultures, and reputations. And they react strongly when they feel something—or someone—has threatened these things.

Many years of working with the communities that surround high-profile online media have taught me several important lessons about leading them:

- **Authenticity is key.** Communities of readers can tell when you're working with their best interests at heart. They can also tell when you're not. They'll question your motives, and they'll debate whatever agendas they think you have. So be yourself, own your decisions, and put the community first. If you don't, your audience won't just desert you—they'll burn the building down on the way out.
- **Check your ego.** Individual personalities can run rampant in traditional publishing. Pundits reign, and rock star authors command the spotlight. But publishing online to a community means forgetting the cult of the author. Here, you're not so much an editor as you are a *facilitator*, someone who works to coordinate the wishes of the group. If you do this the right way, you'll essentially become invisible—and that's as it should be.
- **Be transparent.** When making decisions, involve the website's community. Always. If people feel like they're not involved in the publication's direction or destiny—or, worse, if they feel like they're being duped in some way—they're not going to remain part of your site's audience. Turn decision-making over to your community and allow them to help you construct the site's rules and norms.

Transparency works in two directions: you must not only listen (*really listen*) to the feedback your community gives you, but also be clear and candid when explaining your decisions and the reasons you've made them.

Lesson learned

That last point is especially crucial. I wish I'd taken it to heart when working on that website redesign—because I called that angry reader back. We talked for quite a while, as a matter of fact. And the more we chatted, the more something became clear to me: We'd failed to help our community understand the context for the changes we wanted to make.

The reality was this: the website needed to be economically viable so it could sustain itself and remain the place its readers knew and loved (after all, running servers costs money). But we should have communicated this to our community and asked for their help developing a solution. We should have drawn key contributors into our planning process and made changes even more incrementally, continually checking in with our community along the way. Instead, we temporarily forgot the difference between serving an audience and assisting a community, and our readers let us know it.

The call ended well, but I still haven't forgotten about it. It continues to remind me just how much audiences today are different from audiences of the past. For one thing, they're certainly not afraid to tell you what they think—even if you're the CEO.

Forget that, and you'd better be ready to spend some time on the telephone.

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Measuring the performance of a community manager

Jason Hibbets, Red Hat

In an open organization, measuring performance for particular roles like community managers may not be straightforward, especially when comparing those roles to others with more defined success metrics, goals, and outcomes. In my experience over the past six years, I've worked closely with my manager to make sure that we are in sync with my objectives and what I need to do in order to maximize my impact in my role as a community manager.

In *Managing Performance When It's Hard to Measure* from Harvard Business Review, Red Hat CEO Jim Whitehurst explains how to capture difficult-to-measure output and reward influence in an organization. The key points in the article resonated with me as I thought about my role with Opensource.com. I know not everyone has the same experience at Red Hat, but I'd like to take a look at how the work I do compares to Jim's assessment of how we measure performance in our organization.

Measuring the unmeasurable

First, Jim talks about measuring unpredictable output:

> "What about the kinds of jobs where measuring someone's "output" isn't about counting the number of widgets they produced, but rather it's about how they managed a team or influenced others or helped people collaborate better?"

In my role as a community manager for Opensource.com, I don't directly manage people. I play an "influencer" role with both my internal team and our extended team of community moderators and contributors. I do not have the managerial power to give someone a direct order. However, my leadership style incorporates this knowledge and I will often suggest tasks and objectives that would benefit our community. I strive to explain the larger benefit and try to make the connection to what I'm asking and how it's part of our larger mission.

For example, we provide social media training to our community moderators. We fire up a video conference for an hour, share some of the best practices and techniques we're using, and teach our key contributors to maximize their social media impact. Those able to join have gained crucial experience learning how to use social media to further the website's mission. I can't demand that all of our community moderators participate, but I can ensure that those who do receive tremendous value from the sessions, where we share knowledge and strategy honed over the past few years of running Opensource.com's various social media accounts.

How do you measure the impact of a training session like this? We don't have time to follow each of our moderators streams on various social media outlets and track what they do on a daily basis. Instead, we measure the number of attendees at the training and continue to monitor the overall social media numbers we already track (followers, engagement, mentions, incoming traffic). Anyone who works with social media knows that measuring its impact depends on what you're trying to achieve. Measuring a community manager's influence with social media is about as unpredictable as you can get.

The fact of the matter is, community managers do many little things beyond social media. They have so many interactions with their community members that can be difficult to track—which is why finding ways to measure our impact is really important. My manager and I both recognize that so many one-on-one interactions—emails, Tweets, and private messages—go uncaptured in the daily grind. This is why we focus on bigger objectives like recruiting new community moderators or bringing new authors into our community. It's my responsibility to map those smaller interactions to larger goals.

Staying in the same chapter

In his article, Jim also talks about how to stay in sync with your manager:

> "We've found that it's essential to make sure that associates and their managers are on the same page when it comes to the responsibilities and expectations for the role."

My manger and I use two mechanisms to accomplish this. First, we have a one-on-one meeting every week. In this meeting, I am free to raise questions, concerns, objectives, or bring forward new ideas. My manager also brings a list of things to check on. More importantly, we use this time to discuss any objectives that may be changing or need adjustment—which happens more often than you may think. Sometimes, it's more like making sure we're in the same chapter and then navigating to the same page.

The second mechanism is a weekly 30-60-90 meeting with the entire team. We use this time to check in on medium- and long-term objectives—things that we normally wouldn't be able to accomplish because of our daily grind. We set reasonable objectives that we want to accomplish, such as creating a new resource page (think, What is Linux?) and set a target date. We use our weekly meetings to check on our progress, share our results, and make adjustments.

A general example of being “in sync” may be trying to capture how I spend my time. I will often speak at various open source conferences or attend local meet-ups in the Raleigh-Durham area. My manager and I jokingly talk about giving me a GPS tracker—not to track where I am at each moment, but to try and capture all of things I do and places I go as a community manager that aren't easy to keep track of in a "normal way" for, say, performance reviews.

And when it comes time for performance reviews, the 30-60-90 goals are captured and documented throughout the year. Doing this makes it easy to go back and look at those medium- and long-term objectives to help tell the story of the bigger picture around performance.

Seizing the opportunity

The last thing I'll discuss is something for which I really respect my manager. Jim writes the following final point:

"Managers focus on opportunities, not score-keeping."

This is very true in my role; however, I only recently recognized this was happening after being with my manager for several years.

After celebrating Opensource.com's fifth anniversary, I had a chance to reflect on some of our accomplishments and the various roles I've played over the years. What I realized is that my manager was always looking for the next opportunity and pushing me, in an encouraging way, to explore and execute.

A recent example is a project I've been working on for about a year. We've had many discussions about updating the main navigation for Opensource.com. The teams felt like the old menu had outlived the site's original mission to organize content around limited topic areas (business, education, government, health, law, and life). Since the launch of Opensource.com, we've expanded into many other topics such as open hardware, HFOSS, DevOps, and much more—and it wasn't easy to rip out the menu and drop in some new code. Change is hard, right?

We've been working on updating the site architecture and navigation for months, thinking about how we match the current content with future needs. I've had many discussions with my manager about changing this, and I was finally able to make the case about why this was important. I was able to bring this opportunity to my manager, who let me pursue the changes that needed to be made and work with my team to make the right decisions.

Jim talks about managers focusing on opportunities—and I know this is true in my situation. Over the years, I've learned that associates also need to have the confidence to present opportunities they see that warrant further exploration to their managers. Don't be afraid to share your thinking and ideas for constant improvement.

How do you measure the impact of a community manager?

There is no one-size-fits-all approach to measuring the impact of a community manager. And that's the point Jim is trying to make when he writes that "a traditional performance review rating could never capture the kind of influence [someone] has built inside our organization and the communities we participate in."

There is only one constant: change. If associates are aware of this and stay in sync with their managers, then performance reviews shouldn't be a surprise during the annual review process. Why? Because constant communication is key, and giving people like me freedom to make front-line decisions is what makes an open organization thrive. Those one-on-one meetings are a great time to check in to get direction, clarification, and even confidence.

When setting goals, don't stretch beyond what is achievable. Our 30-60-90 is flexible enough to capture bigger goals and allows us to adjust along the way. In making those adjustments, be willing to open up a discussion on what measurements make sense for performance reviews and team objectives. Flexibility, communication, and collaboration are essentials for thriving in an open organization.

Jason Hibbets is a senior community evangelist at Red Hat, where he is a community manager for Opensource.com. He has been with Red Hat since 2003 and enjoys surfing, running, gardening, and traveling in his spare time.

Everyone changes lightbulbs in an open organization

Pete Savage, Red Hat

At a previous organization, I had a good relationship with the administration staff. I purchased large amounts of goods, and that staff helped my team with our purchase orders. In turn, we'd help the staff with other tasks—such as changing burnt-out lighting tubes in the office. One day, another member of the organization was visiting when a call for me came in. It was my good friend from the front desk, asking me to help her change one of those lighting tubes.

"Sure," I said, and I explained to our visitor, who was checking her emails, that I would be back in a few moments. I returned to the adjacent office, ladder in hand, and within a few moments we switched out the tube.

A few weeks later, I was on the phone with our visitor's manager. He started joking about the lighting tube incident, but was also seriously questioning why I'd bother getting involved. He insisted that it wasn't my job, that I had more important things to do, that someone else could have handled it. What he failed to see, of course, was the relationship I'd built—and the hours of time that relationship *saved me* when I had purchase order problems that had to be resolved immediately.

This was just one example of something people in that organization didn't comprehend. But for the past two years, I've worked at an open organization—Red Hat—and I'm surrounded by people who do comprehend that special something.

Associates here *do* help each other out; we work as a community to achieve our goals. We're not isolated as individuals or teams; we come together as a truly organic workforce, focused on achieving our goals, and we're not afraid to get our hands dirty to help each other when needs arise. That is the power of collaboration. That is the power of an open organization.

I strongly recommend reading Red Hat CEO Jim Whitehurst's book, *The Open Organization*, which discusses Jim's transition from leading a traditional, hierarchical organization (Delta Air Lines) to an open source software company. As I read the book, a smile kept creeping across my face. I've read a few books on similar subjects, but this one is different. I don't know Jim personally, and because I have no real interaction with him on a daily basis, as I read I kept thinking, "Gee where does this guy work again? I want to work there—oh wait, I do!" Cue more grinning.

What was so refreshing for me was the fact that Jim's many thoughts about Red Hat, its culture, its direction, and its strengths were in complete alignment with my own. In other companies at which I've worked, I've always felt a disconnect between the way I view the company and the way senior management sees it. I always found this frustrating, but after two years at Red Hat and one trip through the book, I can honestly say that Red Hat management not only shares my feelings about the company, but also works to *guard* the things that make it special. This is very powerful.

Sharing with others, collaborating, and working together are what make Red Hat what it is. Our ability to "give back" gives us an edge that many other companies don't have and never want. Truly, the best part of my day occurs when I can click a button and share what I've done with others in my team, my company, and ultimately (and most importantly) the rest of the world. This is what I tell people who ask me "What's the best thing about working at Red Hat?"

The communication, the debates, and the constant drive to excel at what we do is also refreshing. While I was working at a previous company (and was much younger—and probably quite naive), I was in a meeting with the management of the information technology organization, to whom I voiced an opinion about the way a particular project was going. The person in charge of the project wasn't really giving answers, and in my naivety I couldn't understand why. So I pressed further. Instead of receiving answers, I received a subject only email from my boss. It read: "Stop talking ... now!"

He later he told me that I'd done no harm, and that all was well. I apologized profusely for voicing my concerns, but in the back of my head was a little voice that wanted to know why certain topics had been off limits. (Even funnier: when I spoke to a good friend who worked as a manager in Germany, she told me not to worry because, in her words, I was "just like the little puppy that pees on the carpet and everyone laughs and thinks it's cute"—gee, thanks!)

Here's what I love about Red Hat: although the debates do often get heated, though they are passionately fuel-injected, we *actually have them*! We actually ask, publicly, "why!" Yes, our discussions can be crazy, and sometimes they go off the rails, but the community nearly always swiftly steers them back on track, and we end up in a place where everyone is better off for having them.

One final thought: open organizations like Red Hat understand how important finding one's "sweet spot" can be. I love the fact that if associates are not happy in their roles, then Red Hat does its level best find somewhere for them *to* be happy. Other organizations can seem entirely uncompromising, like places where people are treated as cookie cutter resources. There, if you're a gingerbread baker who doesn't like baking anymore—well, then, tough cookies (pun intended)!

Being part of an open organization means embracing a certain ethos. Every day, I see people around me embracing that ethos—an ethos that's been part of Red Hat since the company's first days. And it remains something for which I'm truly thankful.

Pete Savage is an open source advocate who has been active in the open source community for more than 10 years. He now works for Red Hat as a quality engineer for the CloudForms product.

Have you revised your goals lately?

Merry Beekman, Red Hat

Pablo Picasso, one of the greatest and most influential artists of the 20th century, once said, "Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success." It's true: today, having a goal strategy is one of the most important leadership tools you have for achieving professional success.

Recently, in support of Red Hat CEO Jim Whitehurst's book, *The Open Organization*, several blog posts on Opensource.com and a Harvard Business Review article have discussed performance management. These writings prompted me to think about my own experience at Red Hat and, more specifically, about how being goal driven is an essential ingredient to one's professional career as well as company success.

An 'a-ha' experience

From 2004 to 2005, I was fortunate to be part of a Red Hat leadership program called Brave New World (BNW). Led by the company's People team, the program required each participant to chose a company-wide initiative for a year-long assignment. With guidance from a coach and an executive sponsor, each project team researched the area, developed recommendations, gained executive approval, and executed an improvement plan for their respective programs.

I chose to join the performance management team. Although it didn't seem as glamorous or creative as other projects, it was one aimed at a very tangible outcome: empowering Red Hatters (associates) to achieve goals and align their contributions to the company's vision. During that year, I had the incredible opportunity to bond with a bright and passionate team. I learned not only about the benefits of a world-class performance management system, but also about valuing teams, championing ideas, and achieving goals. How I thought about goals changed significantly. It was an "a-ha" experience.

Even today, these five steps to more specific, inclusive, and actionable goals remain an essential part of my leadership strategy. You can use them whether you work in an open organization like Red Hat, a Fortune 500 company, or the next big startup.

1. Setting goals, walking the walk

I found having a goal strategy in a flexible performance management system (like the one at Red Hat) is important to thriving in an open organization's culture of transparency and participation.

First and foremost, you alone are in charge of setting your goals. You must take steps to understand what the team, the department, and the company are trying to achieve, then determine how your role aligns with those goals. If you are regularly accountable for setting, executing, communicating, and assessing your goals, you can be very effective as a leader of a project or team. Do you walk the walk?

2. Goals are change agents

Goals introduce an accountability factor. Smart goals are those that act as change agents. You set them for yourself with guidance and approval from your manager. The role of the people manager, then, is identifying goals, simplifying them, managing regular discussions, and keeping everyone accountable when the daily whirlwind starts to compete with them. Here are three focus areas I use in setting goals:

Business-focused goals

Responsibilities are what you do every day, but a business goal is one focused on a value add—something aligned with your team, department, and company's goals. For example, "keeping the website from experiencing unplanned downtime" is a responsibility, but "creating and executing a multilevel plan for 100 percent web site resiliency by Sept. 1" is a business goal related to that core responsibility.

Team initiative goals

Team-wide initiative goals focus on improving productivity, introducing innovation, or solving a problem. Once they select an initiative, team members work together to set goals, develop a plan, and execute that plan in (typically) a six-month time frame. For example, a significant product launch is happening later in the year, and it affects both your team and the stakeholders you support. In the past, confusion and misinformation have impacted your team's productivity and effectiveness. As a people manager, your goal is to streamline communications so your team receives the most accurate information and the product launch team receives valuable feedback. Once you assign an initiative to a team, that team identifies needs and goals, creates the action plan, and gains approval prior to execution.

Professional development goals

This goal is related to applying what you learned while completing training, attending a conference, or reading books. Don't stop with being a better subject matter expert. For example, let's say you want to become Hub Spot inbound marketing certified. That's a partial goal. A more valuable goal is building a marketing campaign based on specific, repeatable best practices that you can share with your team.

3. Smart goals adapt to the business

Having a flexible and repeatable goal framework has many benefits, including recognizing individual achievement, building highly capable teams, enabling collaboration, and transparency within an organization. The teams I lead rarely have one goal for more than two quarters. To be effective, relevant goals have a short life span and we accomplish, retire, or sometimes cancel them on a regular basis.

When setting annual goals (even with a six-month review process), consider how effectively your goals will drive project success and professional development on a "30-60-90-day" basis. What would make them more effective? Do some goals need to be updated, retired, or cancelled? In my experience, short-term, simple goals are more effective for building confidence, learning lessons, and responding to changes in business.

4. Goals are collaboration tools

How informed are you about your colleagues' and team's goals? How about the goals of other departments? To be a successful, you must align your goals with other teams in your department—as well as the long-term company vision. Doing this empowers you to break down any communication silos and enable your team and department to have a broader impact. It can also lead to higher job satisfaction. Start by sharing your goals, learning about others, and finding places of overlap where you can collaborate for even bigger success.

5. Next steps

Look at your personal goals and those of your team. Are they aligned well with your organization's overall direction? Do any goals need to be updated, retired, or cancelled? If you lead a team, what incremental changes are necessary in the next six months to help your team be more collaborative, more productive, and accomplish their goals? How knowledgeable are you about your colleagues' goals?

Pablo Picasso was an exceptionally gifted artist and was universally recognized for his revolutionary accomplishments, not only because of his very special talent but also in large part because he was goal driven. Don't underestimate the power of goals. Specific, inclusive, and actionable ones are your most important vehicles for leadership success. As a result of your mastery, you will be rewarded by having your ideas accepted, by seeing your teams accomplish their goals, and by being valued for your efforts.

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Part II: Engagements

Should open source leaders go native?

Brook Manville, Brook Manville LLC

Anthropologists who traveled to the jungle to study various tribes would debate (half jokingly) whether to "go native"—that is, whether to adopt the lifestyle of the people they were trying to understand, or to keep their distance (and scientific objectivity). It was a research design choice, but also a fundamental choice about one's identity as a more-than-interested visitor.

Leaders in the new world of networks and virtual communities face a similar identity choice. With more leaders taking advantage of informally connected talent, the "wisdom of crowds," and open source innovation, how much should they try to "go native"? Should they operate as members of the networks they want to work with them? Or should they somehow try to manage them from the outside?

Networks, communities, and Joy's Law

At first, it might seem like a false choice. Common wisdom says networks can't be managed, that they're allergic to leadership of any kind. But today many leaders clearly take advantage of informal and open source networks for achieving their strategic goals. In some cases they take the "native" route and act as "members," using their personal influence or relationships to mobilize other talented "colleagues" to pursue a project with them. In other instances, they stand apart but offer soft and hard incentives to engage a network or community of volunteers to come on board. In both cases, they are (in some sense of the word), leading a network. It's a challenge more and more leaders are taking on, realizing that a decade ago Bill Joy got it right: in the talent-rich but more loosely organized and hyperconnected world, "most of the smartest people don't actually work for you." But as a leader you still have to figure out how to make them part of what you're trying to do.

Red Hat is Exhibit A for Joy's Law. Many of the smartest people in the Linux software movement don't work for Red Hat, but the company depends on networks of volunteers to pursue its strategy of providing value-added integration products. And that's presumably why the culture there echoes many of the same freedom-loving, self-governing, open source values of the movement itself. Both movement and corporation are comprised of networks of people with knowledge, experience, and critical relationships keyed to the success of Linux. They share methods for working and seeing the world that old-time anthropologists might call positively tribal.

Going native (or not) at Red Hat

So unsurprisingly, the question of whether to "go native" was an early threshold choice for Jim Whitehurst, as the Red Hat CEO recounts in his lively leadership meditation, *The Open Organization*. The book is a fascinating case study of leadership in a network-centric world. From the day Whitehurst started interviewing, he saw that to get the CEO job (and thrive in it) he would have to become part of open source culture—a culture radically different from the one he previously commanded-and-controlled (as COO of Delta Air Lines). Gone were the privileged parking, corner office, and habitual employee deference of the gentile airline company. Welcome to networks of initiative, anywhere/anytime debates, meritocracy regardless of position, and strong community-style values.

And Whitehurst embraced them all with the increasing zeal of a missionary. The book features anecdote after anecdote of the wisdom of going native. It praises the ways opinionated Red Hatters have taught him how a contrarian idea can yield a better result; it reflects on how a deeply experienced engineer persuaded him to reverse a major software decision; it ruminates on how designing programs with mass participant involvement creates more value for all involved. Jim Whitehurst's glass overfloweth with the people-centric Kool-Aid of network and open source thinking: when those with knowledge and stake in a major new direction help design it, the change always goes more smoothly.

The world already contains plenty of management lore about the benefits of "empowered workplaces." The more interesting question is how best to achieve that objective when one is still CEO with a certain obligation to "control" people who do, well, ultimately report to you. How, in fact, does a leader of networks keep from "turning the zoo over to the animals" (to borrow one of Whitehurst's own phrases)? When and how does one need to stop "going native" and return to one's identity as The Boss?

Experimenting with role and identity

Here Whitehurst's book is less expansive than one might wish. But clearly his leadership journey has involved the constant experimentation with role and identity typical of someone who is sometimes in charge and sometimes only barely so. His stories are full of paradoxical reference to both hierarchical positions in the company (head of this or that function; "senior leadership team") and leadership based on community meritocracy. He sometimes describes himself as CEO and other times simply "a leader" (singular, i.e. one of many at Red Hat); still other times he just seems like one of the crowd.

But *The Open Organization* does offer valuable insights about managing the inevitable native and non-native tensions of someone attempting to foster networks and communities while also leading a public corporation. Sometimes Whitehurst simply has to step out of the community role and be CEO for reasons of external accountability (e.g., to shareholders or regulators). The "leader," as this CEO also writes, must ensure that all the company's great engagement company gets "scaled up" (e.g., by creating platforms of communication). That leader, more than any member of the community, must also ensure that energetic debates about work don't become personally toxic or chaotically spin out of control; he or she must channel the cultural passion and purpose of the organization in ways that actually drive company success. CEO, not community native, must set limits to how much "creative time" associates spend on "what-if" projects that might not yield real ROI.

This Red Hat leader is most explicit when he discusses the classically hierarchical concept of "setting direction for the organization." Here Whitehurst insists his role is not like Jack Welch at GE (or most other CEOs, for that matter); rather, he acts as a "catalyst: an agent that provokes or speeds change or action." Sometimes he's just one more native helping to foment a productive revolution; other times he's curating and gently controlling the ever-creative crowd.

Leadership and boundaries

Whitehurst's identity as a leader (one he humbly concedes remains a "work in progress") is full of tension, and the real source of this tension is clear: Though this CEO defines the "open organization" as one that engages "participative communities both inside and out," he still references a boundary between internal and external communities. Even though he embraces open source culture, Whitehurst is actually overseeing one community of networks (Red Hat) within a broader collection of even more networks (like the Linux movement, over which he has little control). Both must be engaged—Red Hat services are dependent on the broader "product" of the movement—but the CEO's ultimate loyalty must be to the more immediate stakeholders of the corporation: employees, shareholders, and formal partners of Red Hat. Red Hat (the corporation) ultimately does require more traditional supervision than the open movement would ever allow.

The high wire act

Judging by the company's performance, Whitehurst must certainly be managing the native/non-native identity question. As an outsider looking in, I'd guess he's finding just the right balance between joining the tribe and making sure it achieves the right kind of accountable collaboration to grow and thrive.

It's a high-wire leadership act that bears further observation. In the new open source and hyperconnected world, leaders must practice managing concentric circles of collective community production—and navigating the balance between "freedom" and "accountability." Joy's Law will become ever more true. The need for leaders to reinvent their mindsets and behaviors will only become more critical. Network leaders everywhere should hope for a second volume of *The Open Organization*.

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When everything's a request for comments

Bryan Behrenshausen, Red Hat

The Internet's foundational documents are called "requests for comments" or "RFCs." Published by the Internet Engineering Task Force (IETF), the organization whose stated goal is "to make the Internet work better," RFCs define and explain the operational standards by which our worldwide network of networks functions. In other words, they specify the rules everyone should follow when building and implementing new Internet technologies. Engineers working on the Internet discuss potential RFCs, debate their merits, then post their decisions online for anyone to read.

People have been publishing RFCs for decades (Steve Crocker wrote the first one in 1969). By maintaining a common set of rules (technical standards the group typically calls "protocols"), the IETF ensures that the Internet continues to work the same way for everyone—and that everyone can participate in its evolution. Even though the process for ratifying RFCs has changed throughout the past four decades, the name of these documents never has. Since the early days of ARPANET, people have been making requests for comments.

I've always liked this convention. Calling the Internet's founding documents "requests for comments" reinforces the idea that the Internet—this thing that facilitates so many participatory projects worldwide—is *itself* an ongoing collaborative effort, something open to continual re-evaluation and revision. As the IETF notes, the name "expresses something important: the Internet is a constantly changing technical system, and any document that we write today may need to be updated tomorrow." The group doesn't dictate "standards." It doesn't mandate "policies." It just makes "requests for comments." What could function as a definitive declaration instead becomes an invitation. And so the conversations continue.

I often think about RFCs when I'm going about my work in an open organization. Every day, I find myself closing emails and conversations with phrases like "let me know what you think" and "feedback welcome." I often tell people I "want to know what you think about this," or that I "could use your opinion on something." In fact, because so much work in open organizations is collaborative, I find myself doing this more often than not—so often indeed that I've recently begun to wonder if I'm being redundant.

Like each IETF technical specification, every communication in an open organization should be an invitation to refine, re-work, and ultimately improve the project at hand. No one needs to include the phrase "feedback welcome" on an official RFC; the nature of the document itself simply *implies* the solicitation. Regardless of whether I explicitly ask someone for input, I must certainly expect to receive it—because in an open organization, every gesture should be inclusive by default.

It's not always an appealing prospect. As Jim Whitehurst writes in *The Open Organization*, working inclusively can slow decision making, as incorporating multiple perspectives requires precious time and energy. But being inclusive can actually *speed up* implementation, making change management easier. When people aren't surprised by a decision you've made (after all, they helped you arrive at that decision), they more willingly help you carry it out.

So I plan to save myself a few keystrokes, recognizing instead that in open organizations everything is a request for comments. ~~As always, I welcome your feedback.~~ *(Ed: Redundant)*

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What organizations can learn from open culture and technologies

Margaret Dawson, Red Hat

They say life imitates art. But, I believe life imitates technology. Look at distributed systems, decentralized computing, open source, and lean principles. With these and other technical initiatives, we've pushed boundaries and improved our applications, our networks, our companies, and our lives.

We can develop and deploy new applications in minutes rather than in weeks or months.

We can communicate with strangers and loved ones around the globe in milliseconds.

We can create random crowds of investors, who together can fund a person's dream.

We can secure our data without having to lock down our networks.

Today, our lives and our work have all the ingredients to be decentralized, distributed, open, and agile.

And yet, while our lives often imitate the very technologies that enable us to do these amazing things, one aspect has not changed for most of us: organizational culture.

Most organizations today remain highly centralized and hierarchical, with minimal flexibility and speed, and with decisions following a waterfall top-down process.

No wonder most people remain unhappy at work.

Open culture, open organization

However, just as many companies and countries attempted and failed to stop the inevitable flow of information the Internet brought, so will companies fail if they continue to ignore the possibilities of being an open, agile organization.

This topic of running organizations differently has been on my mind lately, as several books and articles I've read all started to come together around these themes. Some of these include:

- *The Lean Startup,* by Eric Ries
- *Lead with Respect,* by Michael Ballé and Freddy Ballé
- *The Open Organization,* by Jim Whitehurst
- An article in Forbes on Thai Lee, the founder and CEO of SHI, the largest female-owned business in America.

All of these stories depict a corporate culture nirvana, one that is both respectful and intense—a seeming dichotomy. As I was reading Lead with Respect, I kept thinking, "this is great, but does any company actually function this way?"

My initial response was "no."

I have experienced more than my share of leadership by yelling, companies struggling with what Jim calls the "elephant in the room" problem (where everyone tiptoes around the CEO and is afraid to tell the truth just to try to keep the leader happy). In these, organizational title is more important than accountability.

However, few companies and leaders appear to truly exemplify openness, transparency, and respect. In *The Open Organization*, Whitehurst refers to several, like Whole Foods, Starbucks, and, of course, Red Hat, where he is CEO.

While none of these organizations professes to getting it all right, their stories share common principles.

A few key principles

The same is true of the articles and books I mention above. Each illustrates this new organizational paradigm differently; however, they discuss several key concepts.

Empowerment

Hire great people and give them ability to make decisions. For example, in lean organizations, management remains, but a manager's job is helping his/her team figure out solutions to challenges, and to make decisions in real time. It's not assuming everyone has the answers or that leadership isn't needed, but it's leading by enabling everyone to be the best they can be, and allowing them to make mistakes along the way. Empowering organizations also provide opportunities for everyone to share opinions or have a voice and do new things. Costco, for example, is known as a great place to work, and one of the few companies where you can "work your way up" and have a career, even if you start at the lowest level.

Managing by example

The trappings of executive titles, offices, and entourages are typically the sign of success in today's corporations. But open and lean organizations turn this trend on its head. One can see executives in cubicles or simple offices, hierarchy is minimal and not emphasized, and, oftentimes, major decisions are "socialized," not dictated. The culture of SHI, for example, dictates no executive parking, no special executive compensation plan, and everyone feeling "valued." Many companies like to say they have a "flat" organizational structure. I don't think any organization is "flat"; however, open organizations don't use title to assume privilege. It reminds of me of the early lean movement in the Japanese automotive industry, where managers worked alongside the "blue collar" workers, and shared their successes and challenges. (Speaking of automotive, I should add here that I was often reminded of Deming and his quality principles when reading these books.)

Fast innovation

In the tech space, we think of innovation in terms of new products or features or design; that is, innovation for these companies is a holistic approach to business. Organizations encourage innovation across all parts, from the factory floor to human resources to sales—and everywhere else. The idea is to be creative, push the boundaries, and get these innovations out to "market" quickly. Often, this cultural trait is combined with the authority to take risks.

Incremental improvement

This really goes hand-in-hand with fast innovation. You innovate, knowing it will not be perfect when you "launch," so you create processes to ensure ongoing improvement. In agile software development, this is typically based on data or clear input, so you know where and what to focus on. There is always the joke about version 1.0 of a new piece of software being rough or buggy, but imagine the freedom of doing everything with not only the understanding but the expectation of a few bugs, along with the encouragement to keep making it better.

Collaboration

Everybody talks about "teamwork," and even the most hierarchical organizations refer to groups as "teams." But few teams or companies are truly collaborative. Collaboration, in this case, does not mean decision by consensus or joining hands and singing Kumbaya. That would directly interfere with fast innovation. It's more about not making decisions or working in a vacuum, bringing others into the process, sharing ideas, creating teams from different parts of the business to ensure success or accelerate action, and just working as teams. In lean organizations, this can be a literal process, as daily standups or project boards, where ideas are shared, challenged and prioritized. In other cultures, collaboration is more just a way of doing business, as at Red Hat, where collaboration is not only encouraged but expected.

I would add a couple others (implied but not stated):

"No jerks" rule

While you would assume that a collaborative culture automatically results in people treating each other more nicely, that is not always the case. This is really about learning to disagree, debate, and challenge each other with respect. Too often, title or role give people the "right" to be jerks. What is implied in a lean or open organization is that everyone at every level deserves respect.

Being "real"

Something about the people in these organizations is different. Look at Howard Schultz (the CEO or Starbucks) or Richard Branson (the founder and

CEO of Virgin). They are honest, emotional, and imperfect. What you see is what you get. This instills a culture of employees also feeling they can be true to themselves, in whatever form that is. This concept is more than respecting diversity. A company can be doing a great job hiring women or minorities and still not embrace the "realness" I'm describing. You know a company is real when the CEO or a senior executive treats the janitor the same way he or she treats the board of directors.

What's incredibly powerful to me is how an organization can become more open or agile, regardless of what the culture or organizational reality has been. As technology continues to push both literal and figurative boundaries, we should look to the core attributes these technologies and systems possess—openness, decentralization, distributed, fast—and move our management and culture in the same direction.

Margaret Dawson is a frequent author and speaker on cloud computing, big data, open source, women in tech, and the intersection of business and technology. She is a proven entrepreneur and intrapreneur, having led successful programs and teams at several startups and Fortune 500 companies, including Amazon, Microsoft, and HP.

Open organizations don't need to serve Kool-Aid

Rikki Endsley, Red Hat

Red Hatters tend to be enthusiastic about the company and our projects, so I occasionally run into somewhat-snarky comments about us "drinking the Kool-Aid," as if we're members of a cult, repeating what we've been told to say. The truth is that any open organization fosters this kind of enthusiasm. The ideas Jim Whitehurst shares in *The Open Organization* aren't new to me—Red Hat isn't the first "open org" I've worked in—but Jim does a great job of explaining this business model to anyone who hasn't yet benefited from it.

When I joined Red Hat in February 2014, I had reservations about how well I'd like the company. I'd been happily self-employed as a tech journalist, editor, and community manager for The USENIX Association since 2011, so I was nervous about making the transition from being my own boss, working with a small group of people I know and like, to being a new kid, way down a corporate ladder in a rapidly growing international tech company.

Prior to becoming self-employed, I'd worked at Linux New Media for several years. Back then, Linux New Media was a German-owned tech publishing company, with locations in several countries, and a small portfolio of print publications and digital products in a handful of languages. At Linux New Media, I worked with editors and writers around the world, and most closely with a small team I helped build up in our newest location, an office in Lawrence, Kansas. Most members of our Kansas team were colleagues—and friends—I'd had since starting my career in the late '90s, when I worked as an editor on *Sys Admin* magazine. Although we didn't call Linux New Media an "open organization" back then, it certainly was. Working at that company prepared me for the culture at Red Hat.

Passionate people

I'd known about Red Hat my entire career in tech publishing, and I'd watched it evolve over the years. Because I worked on publications that covered a variety of Unix, Linux, and open source technologies and news, I didn't have loyalties to any of the tech companies, but I did have contacts and sources in many of them, which meant I also got both an outsider's and an insider's perspectives. By 2013, I knew more than a dozen Red Hatters, and I'd had several long-time friends who worked at the company send me links to open positions. I didn't apply, and I joked that I had no intentions of giving up my sweet self-employed gig because I worked for the best boss ever. But then I started reconsidering (...not the part about me being my own best boss.)

I noticed a pattern among friends who were recommending Red Hat positions to me: All of them were highly experienced, extremely connected, outspoken (and fairly critical), and they had strong personalities with plenty of other career options. But they chose Red Hat. They were happy here, and they were inviting me to join them.

Jim writes, "Every day, the passion of the people who work at Red Hat bubbles up to the surface. Take, for example, Jon Masters, a technology architect, who once gave a keynote speech at the industry-wide Red Hat Summit while riding a bike that was powering the computer server he was using to give his presentation." I burst out laughing when I read this part. (And I'm pleased to see that Jim appreciated the bicycle presentation and gives it a shout-out in the book, because Jon put a lot of work and energy into it.)

I've known Jon since 2006, because he wrote a Linux community column for one of the magazines on which I worked at Linux New Media. In fact, I visited him in Boston when I attended a 2012 USENIX event, and he was working on that bicycle-powered ARM server presentation. As Jim says in the book, "It's impossible to be around people like Masters and not be infected by the passion that pervades this place."

Jim's right. When I decided to apply for a position at Red Hat in late 2013, I considered the contacts I already had in the company, and Jon's enthusiasm for his job and the company was one deciding factor. Feedback from another long-time contact, Joe Brockmeier, also played a huge role in my decision to join Red Hat. Our friendship dates back to the beginning of my career, when I was an editor at Sys Admin and he wrote for us. Whenever I want a brutally honest opinion, I know I can count on Joe, even if we don't always agree. So when Joe told me about an open position that sounded like a great fit for me, I applied. And then came the interviews.

Culture, not Kool-Aid

Like the interviews I'd had at Linux New Media in 2006, and at *Sys Admin* magazine in the late 1990s, I spoke with several people during the process, and whether I'd fit in with my new team was part of the discussion. I still remember an interview question Lori White, *Sys Admin*'s production editor at the time, asked me: "There's one Cinnamon Fire Jolly Rancher left in the candy bowl. What do you do?" The correct answer was: "Leave it for Lori, because they are her favorite." Fortunately, I'm not such a fan of that flavor, so I passed that part of the interview, which was more about having a sense of humor than sharing hard candy. (Eighteen years later, we're still friends, and I still don't take the last Cinnamon Fire Jolly Rancher.)

I spoke with several people on the Red Hat team I was joining, and with one technical recruiter who thoroughly explained the company's open organization culture. I assured him that I thrive in open organizations, but I was more concerned with long-term career prospects. Was Red Hat a place in which I could see myself 10 years from now?

"Red Hat works to enable careers of achievement as well as careers of advancement. In conventional organizations, though, it's all about advancement—how far you can climb the corporate ladder in order to gain the kind of power an influence you crave. But what often happens is that some of the best people may not want to advance in that way," Jim explains in the book. He adds, "That notion is turned on its head in open organizations like Red Hat by promoting the idea that people can excel and achieve what they are best at and still build influence, without necessarily having to do a job that they may not like as much or be as good at doing."

The Red Hat recruiter and I talked about my desire to help create my future position, among other details, and I received an offer that I eventually accepted. Even then, I wasn't sure I'd like Red Hat enough to stick around for a year, let alone 10. Because my new job didn't require me to work in a Red Hat office, I moved to Austin, Texas, where I'd have other tech companies to fall back on if things didn't work out. But within a few months, I'd settled in and began picturing myself at Red Hat in the future. In fact, I wanted to work more closely with colleagues in the Raleigh office, so I decided to relocate from Texas to North Carolina at the beginning of my second year.

The idea of "drinking the Kool-Aid" seems ironic to me, because from my perspective, Red Hatters tend to be our own biggest critics, rather than people who "toe the line." When you work on projects you're proud of, with people you like and respect, and feel invested in a company that allows you to control your career, being enthusiastic is easy. No Kool-Aid required.

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Dear manager: Include me in your decisions

Jen Wike Huger, Red Hat

Red Hat's CEO, Jim Whitehurst, begins the sixth chapter his book, *The Open Organization,* with a sentence that perfectly summarizes a crash course in making inclusive workplace decisions:

> "The conventional approach to decision making centers around equipping the responsible person with the information needed to make an informed decision. ... But in the end ... the responsible executive makes the decision."

The keyword here being *executive*.

Throughout the book, Whitehurst focuses on changing our thinking about *executives* and *top-down management,* asking us to consider how *associates of all levels* can participate *bottom-up decision making* instead. In the book's first five chapters, he tells stories and presents compelling ancedotes to this effect. Then, in chapter six, he delivers the one-two punch: He explains *how* to make it happen.

What your associates want

- Respect
- A voice
- To be heard
- Participation in the decisions

What you want to do

- Change (yes, you, the manager must change first—then, you can catalyze change in your associates)
- Build understanding, trust, and buy-in
- Include your associates
- Listen (and listen more)
- Be open to a wide variety of ideas

How you want to do it

- Read *The Open Organization*
- Take notes
- Talk to the associates with whom you work; ask them, "What do you think?"
- Explain your thought process and reasoning for wanting to make changes or particular decisions
- Acknowledge people's concerns
- Implement methods for input and feedback cycles (it's a continual process)
- Allow people to try different approaches

Change management and inclusive decision making may be something you've heard about but have never felt you had the capacity to do in your company. Or maybe this is all brand new and eye-opening. Either way, Whitehurst points out that decision making processes at your organization are pivotal sites for change.

> "At Red Hat, we do things differently. We strive for change management to happen during the decision making process, not during execution. [...] Associates feel more ownership in the changes needed when they are involved in making the decision behind them."

You make decisions every day. Your associates make decisions every day. Today—even within the next few moments—you have a chance to try something different.

Jen Wike Huger is the content manager for Opensource.com. She manages the publication calendar, coordinates the editing team, guides new and current writers, and speaks for Opensource.com.

8 tips for creating cultural change in your organization

Laura Hilliger, Greenpeace International

When working to open up organizations or projects, I've learned that one of the most difficult things to do is to get people out of their comfort zones. We adults have spent a lifetime learning and refining our personal processes for productivity, creativity, and thoughtful exchange. One person's workflow might not work at all for someone else. We've learned that our workflows are highly personal, and I believe they are. However, in the case of "workflow," I see a massive difference between the terms "personal" and "private."

Let me explain that: Open means anyone can have a voice and get involved, but in order to truly encourage people to use their voices, the first thing they have to know is that they're being invited. We call this "designing for participation." A project or a community has to set up infrastructures, design workflows, and structure feedback to be that invitation all the time.

Producing a cultural shift (which is what "opening up an organization" really means) is about changing the trajectory and image of an organization so that it becomes more "open."

Culture is two things:

1. A shared space and "the prevailing beliefs, values, and customs of a group; a group's way of life," and;
2. What people do in that shared space, or "a set of practices that contain, transmit, or express ideas, values, habits, and behaviors between individuals and groups"; practices define organizational cultures.

Leaders must model the behavior they want to see in the world. So, in order to spark organizational change, leaders must start designing for participation.

Here's some practical steps you might take to design your team or project for participation.

Utilize existing structures

Email lists, Facebook pages/groups, newsletters, forums, corporate social networks—the people are somewhere, communicating already. You have to meet people where they are, so make a list and plan to utilize those structures. Use surveys and conversations to gather this information from people in your organizations. These should include questions like:

- How are you working together? What's a typical day look like for you?
- What tools do you use? What tools does your team use?
- What backchannels are you using?
- Where do you push information? Where do you pull information?
- What are your inside jokes? Favorite memes?
- What things are you loving this week?

Questions like these can help you demystify communication tactics.

Find an ally or three

Showing what open collaboration looks like is essential to creating cultural change. Remember: people are comfortable with what they're used to and change is essentially uncomfortable. Showing what the end goal—openness—looks like will inspire most people to invite change. However, in order to truly demonstrate open collaboration, you need collaborators! From the beginning, you're likely to find people who are excited to try something new. Artists, creatives, and makers are usually accustomed to this kind of openness. Work with them, get them comfortable with being open, and then you'll have a posse of change agents.

Recognize personal flow

By getting to know your allies and how they prefer to work, you can set up methods that allow people to plan and publish openly. Encourage your allies to document, plan, publish—work—in a way that is suitable to them.

Have open conversations to negotiate tools and processes, and leave the door open for renegotiation. If a tool isn't working for your team, find another one! You don't have to force the workflow; you just have to put the structures in place to allow work to flow. Test multiple collaboration tools.

Model, model, model

You can initiate cultural change by modeling behaviors. You and your posse need to model behaviors to establish trust. You can only control your own behaviors, so start implementing open practices: Plan openly (using an open, online task manager and open meetings), publish openly (using blogs and social media), evangelize openly (end posts with prompts for involvement), embed creativity and play (because play allows us to explore the impossible).

Plan in the open

Start meeting weekly with a conference call and an open planning document. Your agenda might include:

- Standups (what people are working on)
- Feedback
- Report outs (what people worked on last week)
- Demos and celebrations

Putting your plans into the open will help people feel ownership over projects. Think about using a wiki to keep an overview of team activity that includes goals, roles, deadlines, and so on. Use a task manager so that everyone knows what's in process, where there are challenges, and what is actually happening. You can use documentation as part of your team process, thereby creating fodder for individual blog posts. Encouraging people to write public reflections on why an idea does or does not work; this way, you're designing a culture that invites feedback.

Publish in the open

To foster engagement and keep people posted, publish, and share both individually and as a team. Setting a schedule is difficult, but you should try to publish at least one reflective post per month (I do one a week). Pre-populate tools like Tweetdeck or Hootsuite during meetings. Utilize tools like

IFTTT, Zapier, Buffer, etc. There are easy ways to share ideas around the Web. Use them!

Evangelize in the open

Instead of thinking abstractly about engaging a global community of people, be nimble, try things out, have ideas, and model open behaviors. Play and prototype and share loudly. As people begin to take notice, you'll have every opportunity to evangelize openly. Don't forget to highlight the rock stars in your community.

Reach out

Those of us who believe in the open organization are always willing to give advice and help out. Don't be afraid to reach out!

Laura Hilliger is an artist, educator, writer, and technologist. After five years at Mozilla, where she advocated for open and helped spread web literacy, she's now an Open Organization ambassador at Opensource.com and working to help Greenpeace become an open organization. She's all over the Web. Use your favorite search engine to learn more about Laura and what she does.

Sometimes you have to put the moose on the table

Sam Knuth, Red Hat

Red Hat is known for its open culture. People openly share their opinions, give each other positive and constructive feedback, and make better decisions through collaboration. Jim Whitehurst has written about how to foster a culture like ours—one that supports honest (and sometimes difficult) conversations.

So it might be surprising that in a recent meeting of Red Hat managers, where our CFO Frank Calderoni introduced himself to the team, one of the questions from the audience was: "How will you change the passive aggressive habit of many at Red Hat to say 'yes' in the meeting but 'no' in practice?" The audience offered sympathetic sighs and knowing smiles. But isn't this Red Hat, where we have open conversations, tell people what we really think directly, and avoid this kind of "say one thing, but do another" dynamic that plagues other companies?

Yes. But as different as the Red Hat culture is from that of other companies, it has one big thing in common with them: it's made up of people. For most people, it's easier to avoid confrontation than to tackle it head on, even if your organizational culture values transparency.

Frank's answer was quick and simple: "Call them on it."

After a brief pause, he followed by pointing out that we all demonstrate this behavior once in a while. No matter how much we each think we're different, we all have some of these tendencies. In addition to calling others on it, you have to call yourself on it as well.

Avoiding factions

Recently, I've been in a situation where, in one-on-one conversations with different people on the same team, I've kept hearing the word "factions." It makes me cringe. We have factions? Why?

What I'm observing is exactly the kind of behavior that everyone claims to hate: a group of people meeting together, sort of agreeing, then breaking out into side conversations afterward saying things like "what are they thinking?"

I find three things helpful when I sense either my colleagues or myself are straying into this "let's just agree to get out of this meeting and then we'll figure out what we really want to do" territory.

First, remind everyone (including yourself) what the ultimate goal is. We're not here because we want to prove that our way of doing something is better. We're here (in the case of my team) to enable customers to learn about, deploy, and use Red Hat products to solve their business problems. Stepping back from whatever issue is causing the tension (often just having a different approach or style) and focusing on the real goal can help clear the air.

Second, as our new CFO Frank says, call them on it. Or, as a lot of people in Red Hat like to say, "put the moose on the table." This can be hard, and it is better done in person than over the phone or video conference. You also need to be careful with your phrasing. Don't turn it into an accusation, and stick to the facts of the situation and the impact those facts are having.

Here's an example from a recent interaction on one of my teams: "We're all doing different things to try and get our heads around this bigger goal, but I feel like we're not making progress. Rather than each trying to go our own way, often conflicting with each other, can we step back and figure out a short term and long term plan that is workable?"

Until somebody puts this on the table, it's hard to talk about. Instead of confronting the problem, individuals (or "factions") spend time talking about how their way is better and how they wish the other guys would stop messing things up. That kind of behavior is wasted energy. It doesn't benefit anyone—and the big losers end up being our customers.

Finally, in addition to calling people on the bad behaviors, thank and reward people when they have the courage to bring the team together and solve problems constructively. Putting the moose on the table is hard; make sure you publicly acknowledge people who do it.

All about communication

Ultimately, communication is the most important—and one of the most easily overlooked—tools we have. If you see something that is bothering you (or something that is really great), say so. Here's what I've found works best:

- Begin by stating the facts
- Let those facts tell the story that explains the impact the situation and behaviors are having
- During meetings, make sure every attendee has a chance to comment on that story
- If someone disagrees with the way that story's been framed, ask for clarification
- Leave the meeting with a firm action plan—one that's written down

Because everyone needs to be moving in the same direction, everyone needs to be part of the process of getting there. After all, do you really think you can get an entire moose on the table all by yourself?

At Red Hat, Sam Knuth leads the Customer Content Services team, whose goal is to provide customers with the insights they need to be successful with open source technologies in the enterprise.

Part III: New Contexts

7 co-op business principles for the open organization

Jason Baker, Red Hat

What makes the concept of an open organization so great is not its novelty, but rather of the ways it borrows from already tried-and-true business and organizational practices. In other words, what makes an open organization an interesting concept (and one I think could be a model for others) isn't some unique secret. The notion of an "open organization" is really a compilation of many ideas—related to openness, collaboration, and sharing—that have proven successful time and time again, along with a simple commitment to intentionally follow them.

As I read Jim Whitehurst's *The Open Organization*, I couldn't help but reflect on my first job out of college. I had taken a position in a local food co-op, working in the marketing department and primarily managing events for three retail locations. But about three months in, when a co-worker left to head to graduate school, I began managing owner services and outreach. I was managing relations with our owners, who happened to be our employees and customers. As a big chunk of my job became both answering questions from existing owners, educating new owners about cooperatives, and serving as executive secretary to our board of directors, I quickly tried to learn as much as I could about cooperative business structure and operations.

When I say cooperative, I don't mean just "an organization that cooperates." Cooperatives are a type of business with very specific criteria defining what they are and how they operate; many countries have their own laws and regulations which lay this out.

Cooperatives come in all shapes and sizes, from insurance and banking cooperatives (think: credit unions) operating at a national scale, to regional farming and rural electrification cooperatives banding together resources to help people for whom other business models failed, to small businesses who want to focus on serving the needs of their employees and customers first and foremost.

The ideas behind cooperatives are hundreds of years old, but most references to how co-ops define themselves date back to the Rochdale Society of Equitable Pioneers, an early consumer cooperative dating back to the 1840s in Great Britain. From the Rochdale Society came seven principles for what cooperatives are and how they operate—what people refer to as either the "Rochdale Principles" or simply the "7 Cooperative Principles."

The decision to organize a project or business as a cooperative depends on a number of factors, but I think even more "traditional" organizations can learn many things from them. Does every organization need to be organized as a cooperative to benefit from some of the things that make cooperatives successful? Of course not. Whether an organization is a traditional for-profit corporation, or even a nonprofit, there are a lot of concepts which can be learned from co-ops. The more I thought about what an open organization meant to me, the more I thought back to my time at a local co-op and how some of the things I saw there were starting to resurface in the corporate world when businesses saw the advantage of "going open."

So let's look at those seven cooperative principles and discuss what they might mean for an open organization:

Open and voluntary membership

This is an important part of most open source project definitions: Anyone can contribute, so long as everyone follows the community guidelines. Some projects take a slightly stricter approach, requiring some formal agreement or membership in an organization before they'll accept pull requests, but the lower the barrier to entry, the more people can participate.

This concept is even more important from a user's perspective, and it's one of the fundamental parts of what it means to be free, open source software. Anyone can use make use of the project's outputs for any purpose they see fit, and, just as importantly, as the controllers of their own machines' destinies, they should have the right to choose not to run a piece of software if they so choose.

Democratic member control

Democratic member control in open organizations speaks to the importance of meritocracy—that the best ideas come about when everybody can fully participate and judge suggestions on their own merits (rather than simply looking at the relative rank of the contributor). This doesn't mean some sort of structural management hierarchy doesn't exist within the organization; it just means that everyone has an equal right to participation and to be heard.

Members' economic participation

The concept of economic participation is the element most unique to co-operatives, but many organizations (regardless of their type) may benefit from making sure that all participants have some "skin in the game." Whether this takes the form of incentive-based pay or a shared pool of rewards to be distributed from the organization's profits, economic participation is another way to build loyalty and trust.

Autonomy and independence

Simply put, an organization can best control its own work when it gets to make decisions about the outcomes of the projects on which it works. People can make decisions at the most local levels possible, whether in the form of developers' deciding how to design a particular section of a project's architecture or a staff's choosing the tools that best enable them to do their own jobs. These principles also speak to the importance of open source projects maintaining control of their own destinies; if a strong faction feels they aren't being heard, they have the full right and ability to fork the code.

Education, training, and information

As much as we might like to believe that openness itself breeds the free flow of information, education is still an important part of any open organization. It ensures that newcomers are able to get up to speed and become full participants as quickly as possible, and it helps create a flow of information which allows other organizations to see the benefits that come from openness.

Cooperation

Open organizations have much to learn from one another, regardless of the sector in which they operate. In the open source world, we frequently see developers from competing companies working side-by-side to build a superior project from which everyone can benefit.

Concern for community

Finally, any organization must recognize that it's not the totality of the world in which it operates, and that it must give back, in a meaningful way, to the community around it. Whether this contribution is code, employee time, or making environmentally and socially conscious decisions about how to operate, giving back builds trust.

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Cooperatives and open organizations have much to learn from each other. You need not be one to be the other, but plenty of their characteristics naturally overlap, and those interested in building successful participatory organizations would do well to study both.

Jason Baker is a data analyst, marketer, technical editor, and occasional coder who has worked on staff at Opensource.com since 2013.

What our families teach us about organizational life

Jim Whitehurst, Red Hat

In October I appeared on the 100th episode of The Dave and Gunnar Show, an independent podcast about open source and open government issues hosted by two members of Red Hat's public sector team. We spoke at length about *The Open Organization* (one of my all-time favorite topics!), and the interview gave me a chance to address an important question.

That question actually came from Paul Smith, Red Hat's VP of Public Sector (you might recognize him as the guy who recently photobombed me at a book signing), who asked:

> How can you apply the open organization principles to your family life?

This wasn't the first time someone had posed this question to me. In fact, I'd been mulling it over for quite some time. The truth is, people who succeed in leading open organizations embrace open principles in multiple aspects of their lives—not just in the workplace.

Emotions matter

When we're with our families, we recognize that emotions matter—and we express them. We laugh. We cry. We have impassioned debates. We're frank with one another, because we recognize that our deep relationships will outlast any single interaction (even a turbulent one). And we recognize that the people in our lives aren't entirely rational; they're motivated by more than their left-brain impulses. But we tend to check our emotional selves at the door when we enter the workplace.

Why?

Emotions are a sign that we're deeply invested in what we're doing. Good leaders know how to read and gauge them (as I say in *The Open Organization*, outstanding emotional intelligence is pivotal today). Emotions are indicators of employee passion, something open organizations must harness if they're going to be successful today. Family life forces us to confront, embrace, and channel emotions. Life in an organization should do the same.

Engagement in the home

Trust me: I'm speaking from experience when I say that participating in a family requires cultivating engagement. Families tend to work best when everyone has sufficient context for understanding the group's goals (not to mention the resources the group has for *achieving* those goals).

In fact, family goal setting should be a collaborative effort. I'm not sure too many families sit down at the beginning of a new year and have frank discussions about their goals for the coming months. But more should. After all, families tend to recognize the importance of having everyone on the same page, working in the same direction. Questions like "What charities will we support this year?" or "Where will we vacation this summer?" are too often questions that individuals try to answer themselves when they should be bringing these to the group for a more robust discussion.

Inclusive family decisions

When goal setting becomes collaborative, it immediately becomes inclusive: Family members suddenly have a stake in family decisions, and they feel tied to the outcomes of those decisions. They embrace the group's objectives, and they work to help achieve them.

Imagine the difference. You might come to a decision privately, then communicate that finalized decision to your family in the hope that they'll accept it, understand it, and help enact it. But have you ever taken this approach with your kids? It doesn't end well (actually, it typically ends with confusion and hurt feelings). But you might also consider involving family members in decisions from the start, gathering feedback and adjusting your expectations accordingly. In the end, family members will not only better understand the implications of big decisions, they'll also feel more invested in the process of carrying them out. My experience at Red Hat has taught me this, because the company works with so many passionate open source communities, and issuing orders to a group is simply not as effective as drawing that group into a dialogue.

So in response to Paul, I'd say: You might be asking the wrong question.

The real question is not about how principles of open organizations can apply to life with a family. It's about what our family relationships can teach us about creating more open, inclusive, participatory, and humane workplaces.

Jim Whitehurst is President and CEO of Red Hat, the world's leading provider of open source enterprise IT products and services, and author of The Open Organization.

Implications of *The Open Organization* in education

Don Watkins, DGW Enterprises

While I read Opensource.com article "Goodbye Henry Ford, hello open organization," a line describing traditional organizational structures as "rigid and slow to adapt" with "silos and lack of communication" caught my eye. Those words could well describe the PK-12 education sector, where I spent many years.

You see, public education is run by benevolent bureaucrats, most of whom never set foot in a classroom. Policy is passed from federal and state legislatures to local boards of education and eventually to schools through administrative teams who oversee teachers and students. All communication in the system is top-down—there is no effective communication that goes in the opposite direction.

There was a time when such a system might have made sense (in the industrial age). Today we live in a post-industrial society, and in a marketplace where communication and collaboration are essential to survival. Therefore, education needs a new model for management. I think the ideas Jim Whitehurst outlines in *The Open Organization* could have implications in education.

Early on in the book, Jim tells a story:

> I issued what I thought was an order to create a research report. A few days later, I asked the people assigned to the task how things were going. "Oh, we decided it was a bad idea, so we scrapped it," they told me in good cheer."

I cannot imagine that sort of a scenario playing out nicely in an educational organization. The PK-12 education system mirrors the Henry Ford model of top-down management. Most of what I observed over the course of my career was stratification with administration at the top, teachers in the middle, and non-teaching staff at the bottom. All policy originated at the top and trickled to the bottom.

The open organization that Jim writes about fosters cooperation and collaboration. This is frequently spoken of in education circles, and many speak of cooperative learning, but that only involves teachers and students. Since the purpose of education is to prepare students to be productive in our society, it makes sense that we ought to be preparing them for the future which will include much more open organizational structures.

As an educator, I believe that the sharing and open culture of Red Hat marks a welcome paradigm change that invites replication in the education sector because it points forward. Education is essentially about leading others and instilling values and practices that benefit the learner and—we hope—society over the long run.

In the recent past, students came to school and were told that working hard, getting good grades, and college admission led to employment. Now most students and their parents know that this formula no longer works. However, the educational bureaucracy continues to put students through the Henry Ford model, which produces easily counted widgets but results in dysfunction and dystopia.

The current emphasis on raising standards in education misses the point. We should raise standards, but more importantly we need to change the paradigm and fundamentally change how students are educated. We need schools where creativity is celebrated and the principles outlined in *The Open Organization* do provide ideas and principles which could be applied to education from pre-kindergarten to college.

Imagine schools where passion and engagement drive the learning and assessment equation. Typically, students who excel are rewarded while those who don't do well are discouraged to say the least. Part of the Red Hat culture is "fail fast," which is a recipe for real learning because it celebrates failure, the true key to success.

It's okay to fail in an open organization, and people are encouraged to own their failures and be accountable for them. That's an invitation to integrity and character education. Real learning involves cognitive dissonance. Tinkering and making are meta-cognitive skills that celebrate this type of learning. We learn to walk, to ride a bicycle, to program a computer by trial and error.

Don Watkins is a community moderator at Opensource.com. He is an educator, social entrepreneur, and open source advocate who holds an M.A. in Educational Psychology and an MSED in Educational Leadership.

Afterword

Jim Whitehurst, Red Hat

When I was pitching *The Open Organization*, publishers always asked me the same question: "Is this a book about management or leadership?"

And my answer was always the same: "*The Open Organization* is a book about management." After all, it's about the ways Red Hat, the open organization I lead, uses a networked organizational model (one we adopt from the open source world) to make decisions and coordinate, and those are management issues.

But as the book took shape, its eventual publisher, Harvard Business Review Press, insisted otherwise. "So much of this book is about leadership," people at the press told me. "It talks about are things you're asking leaders to recognize and do to motivate associates."

So I took a step back and really thought about what they were suggesting. And that prompted me to reflect on the nature of the question at the heart of the matter: "Is this book about management *or* about leadership?"

It's the "or" that struck me—the assumption that management and leadership are in fact two isolated, separate domains. I struggled to understand how their division had become so deeply entrenched, because it seemed to me that open organizations in particular don't embrace this distinction.

The key to the conundrum, I realized, is emotion. As I argue in *The Open Organization*, classic management theories try to pretend that emotions don't exit in organizational contexts. It's one of the assumptions they make in order to justify their models of the way the world works. In order to better understand management as the "science" of distributing decision rights, developing control functions, budgeting, capital planning, and other detached, disinterested activities like these, management theories "abstract away" humanity. They presume people are entirely rational and that hierarchies always function the way they're supposed to. (Incidentally, they do this because they owe much of their thinking to work in classical economics, which performs the same simplifying maneuver: assume people are rational, that they have perfect information, and that markets are in equilibrium—and only then can you "make the math work"!)

We're beginning to learn that these assumptions are seriously misguided. New research in behavioral economics is constantly teaching us how patently false they are. They may have been necessary at a certain point in time—for example, when management dealt mostly with uneducated workers performing relatively rote tasks, when work environments were essentially static, and when information was scarce rather than abundant—but they no longer apply. Our age requires a new management paradigm, one that taps the passion and intelligence of a workforce motivated by something other than a paycheck.

I believe the open organization is that model. But a management model based on something other than the assumption that all people are like Star Trek's Spock is practically unheard of today. Talking about ways to tap and mobilize people's emotions, how to get people to act in ways that transcend themselves, and how to understand what motivates them to arrive at the decisions they do—all that is the province of "leadership" studies, not "management." We've always known these practices exist. We've just cleaved them from management "science" and relegated them to their own territory: the "hard" science of management over here, and the "soft" skills of leadership over there. And there they've stayed for decades.

But when you think about management and leadership, you immediately realize that they're both essentially attempting to understand the same thing: How can we get people to work together, in a coordinated fashion? They shouldn't be separate. Truthfully, they *aren't* separate. They only seem separate because we've thought about them this way for years.

So is the book about management *or* leadership? I'd argue it's about *both* management *and* leadership: two arts of coordinating people's efforts, finally reunited.

Six months of conversations with managers, leaders, and readers in the *Open Organization* community have taught me this important lesson. And those conversations almost inevitably raise the following question: *What's next?* How can we begin putting open organizational practices in place? Where will open thinking eventually lead us?

The truth is that I don't know. But I do know this: We can look to open source communities to show us the way.

Open source communities demonstrate participatory organizational principles in their purest form. Red Hat has been incredibly lucky to work with so many of these communities—which are essentially fertile and fascinating petri dishes of experimentation with cutting-edge management and leadership ideas. We learn from them every day.

And we'll continue looking to them for guidance on our journey, because they represent our greatest hope for making workplaces more inclusive, more meritocratic, and more humane. These communities are constantly innovating by questioning tradition, and that's precisely what any organization must do if it wants to remain viable today. I've begun questioning the "traditional" distinction between management and leadership—but this entire volume is evidence that people everywhere are overturning deeply-held beliefs in search of fresh insights and new directions.

Six months of community conversation have proven that.

Additional resources

The *Open Organization* FAQ

Since publishing *The Open Organization*, Jim has received many questions. We collected the most frequent ones in the *Open Organization* FAQ at Opensource.com.

The *Open Organization* reading list

If you enjoyed *The Open Organization*, then you're sure to love the books already in conversation with it. Jim cites more than 25 inspirational books in *The Open Organization*, and at Opensource.com we've collected 10 in the *Open Organization* Reading List.

The "Open Organization Highlights" newsletter

Get open organization stories sent directly to your inbox—several times each month! Visit our homepage to sign up.

Discussion Guides

Want to start your own *Open Organization* book club? Download the *Open Organization* discussion guides for help getting started.

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Every week, Opensource.com publishes stories about the ways open principles are changing the way we work, manage, and lead. The next one could be yours. Please consider submitting it to us at opensource.com/story. We're especially interested in the ways open source values are making waves in

- Government organizations
- Educational organizations
- Non-profit organizations
- Creative industries
- Open source communities

Spread the word

Are you passionate about using open source ideas to enhance organizational life? You might be eligible for the Open Organization Ambassadors program (read more at opensource.com/resources/open-organization-ambassadors-program). Share your knowledge and experience—and join us!