Catalyst-In-Chief: A Year of Conversations about the Open Organization

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Colophon

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2 http://dejavu-fonts.org/wiki/Main_Page

3 http://overpassfont.org/

4 https://www.libreoffice.org/

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Introduction

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We're in the midst of a new economic and technological era, something people often refer to as "The Fourth Industrial Revolution[5]"—or "Industry 4.0[6]" for short. Smart, connected, and responsive technologies are merging with environments that are becoming more data-rich, and, as a result, digital disruption[7] to more traditional business models is becoming the norm, not the exception.

Lots of people are scrambling to determine how all this upheaval will affect not only *what* they do, but also *how* they do it. As they're doing this, they're coming to a crucial realization: Organizational structure—how you work, the culture that permeates and guides all your activities—matters more than ever. That's because it's the most important factor in a group's ability to produce new and exciting innovations, and today, that ability to innovate is without a doubt one of the most valuable resources an organization can harness as it tries to gain competitive advantage.

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5 http://www.forbes.com/sites/jacobmorgan/2016/02/19/what-is-the-4th-industrial-revolution/

6 https://en.wikipedia.org/wiki/Industry_4.0

7 https://hbr.org/2016/04/the-real-power-of-platforms-is-helping-people-self-organize

When I wrote *The Open Organization* a year ago, I wasn't trying to claim that my colleagues and I at Red Hat, the world's leading open source software company, had discovered some definitive answers to the questions digital disruption is raising. I recognized that our story—and the way we work every day—contributes something important to the dialog around it. Even now, one year later, I can't say we've found all the answers. However I can say we're seeing the conversation accelerate. In the Open Organization section on Opensource.com[8] and elsewhere, people are discussing, debating, and calling into question some age-old wisdom about work, management, and leadership. I'm proud of the role Red Hat is playing in catalyzing that conversation.

And this book contains my contributions to it. Since writing *The Open Organization*, I've found it extremely important to continue thinking, writing, and talking about both the changes we face and the promise open source thinking holds for helping us navigate them. Quite simply, the past 12 months have been a year of wonderful conversations about the open organization. They've been filled with insights, questions—and, yes, even a few doubts—about the shape the future of work will take.

Important challenges remain. Think of the pyramid I sketched in *The Open Organization* to explain the way networked organizations should rethink management's core dynamics. Open organizations, I said, always begin with "why"—with instilling passion and purpose in everyone who joins them—so that mission becomes the driver of innovation. That's the base of the pyramid, the foundation. That passion, purpose, and engagement "bubble up" to the top of the pyramid, which is concerned with "what"—what leadership does to create the most fitting and productive contexts for that passionate work.

8 https://opensource.com/open-organization

In the middle of the pyramid is "how," the concrete and specific activities that occur when leaders-as-catalysts and associates-as-engaged-participants meet. It's that middle part that continues to prove most mysterious and elusive to organizations today. How specifically can we develop tactics to harness and direct passion and performance? How can we systematize our most successful structures? And how do we share our best practices and our failures?

These are the questions that will drive the second year of conversations about open organizations. You can play an important role in those conversations. At the conclusion of this book, you'll find resources and avenues for connecting with the open organization community, so you can chat, think, and learn with us.

I sincerely hope you will.

A Year of Conversations

Like open source software, a book is more than its content

Originally published August 25, 2015

Since launching the *The Open Organization* in June 2015, I've received questions about why we chose to distribute the book via a traditional publisher. Some have wondered why we didn't release the book with a Creative Commons license so people could remix, redistribute, and even translate the book as they wanted. Others wondered why we didn't crowdfund it so its audience could be more tied to its success. Several have asked why we didn't simply release the book online as a free download.

Instead, we chose to partner with Harvard Business Review (HBR) Press. In many ways, HBR does for books what Red Hat does for open source software; it collaborates with creators and adds value to the products of these collaborations. Like any piece of open source software (such as Red Hat Enterprise Linux, for example), a book is far more than the content it contains. Like a software application, a book is a project with multiple stakeholders. It involves an agent that works to put the book on publishers' radars. It involves an editorial team that reviews manuscripts and suggests improvements. And it involves a marketing team that decides how best to develop and target potential audiences.

HBR brought to this project an outstanding record of success in selecting, editing, publishing, and promoting business books. What's more, while we were writing *The Open Organization*, HBR editors provided invaluable knowledge of our target audience, and helped us organize and outline the book in ways business-savvy readers would appreciate.

HBR also provided something else: the trust of its readers, who expect it to deliver something valuable (the same way our customers expect Red Hat to deliver valuable, tested solutions). We knew that by enlisting such a respected partner, we'd benefit not only from HBR's resources and expertise, but also from the HBR's strong reputation.

Like Red Hat, professional presses incur expenses when they do their work. They therefore require a revenue model that will make their businesses sustainable. In the case of HBR, this model involves selling material licensed via traditional copyright terms. HBR taught us that retail outlets are the primary drivers of demand for business books like *The Open Organization*, and those outlets (with their valuable consumer-facing shelf space) require a physical book to sell. They typically don't want to invest in showcasing a book that someone can download for free.

In the end, we decided that pursuing a traditional book publishing model would best help us achieve our objectives: distributing *The Open Organization* as widely as possible, and growing the community of leaders with whom we hope it resonates. Incidentally, growing that community also requires effort and resources. HBR has invested heavily in the book's success by promoting it at industry events and securing table space at major retail outlets. We've matched those contributions with our own community-building efforts, particularly the launch of a special section of Opensource.com where conversations about the book's ideas can take place.

In addition, it's important to recognize that Red Hat will not profit from the book. While we'll use some of the book's revenue to cover the costs we incurred writing it, once we cover those costs, we'll be donating all remaining proceeds to the Electronic Frontier Foundation—a nonprofit organization defending civil liberties in the digital world.

Running an organization means locating opportunities to work with all kinds of partners on the road to success. Publishing a book about an open organization is no different.

This article originally appeared on Opensource.com[9]*.*

9 https://opensource.com/open-organization/15/8/open-source-software-book-more-its-content

What our families teach us about organizational life

Originally published November 10, 2015

In October I appeared on the 100th episode[10] of The Dave and Gunnar Show[11], 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[12] 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.

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10 https://dgshow.org/2015/10/100-a-president-and-ceo-we-like/

11 https://dgshow.org/

12 https://twitter.com/pjsmithii/status/614207083785883648

Emotions matter

When we're with our families, we recognize that emotions matter—and we express them. We laugh. We cry[13]. 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 rec-

13 http://money.cnn.com/2015/06/09/pf/crying-at-work/

ognize 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.

This article originally appeared on Opensource.com[14], and, subsequently, as part of The Open Organization Field Guide[15].

14 https://opensource.com/open-organization/15/11/what-our-families-teach-us-about-organizational-life

15 https://opensource.com/open-organization/resources/field-guide

What the community has taught me about open organizations

Originally published December 2, 2015

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 exist 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[16] 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.

This article originally appeared as the afterword to The Open Organization Field Guide*, and, subsequently, on Opensource.com[17].*

16 https://opensource.com/open-organization/resources/field-guide

17 https://opensource.com/open-organization/16/1/what-community-has-taught-me-about-open-organizations

Becoming a master of organizational jujutsu

Originally published February 2, 2016

One of the most difficult questions I get about open organizations comes from readers working at large companies with deep, rich histories. "I understand how you grew your culture at Red Hat," they tell me, "and I understand how open source communities can function the way you describe, but I work in a place with an entirely different structure and culture. How do I begin to catalyze the kinds of change you're describing?"

Recently I confronted the question yet again, when a senior executive from a global industrial company met with me to talk about ways she might open her organization. "We're really trying to change our culture and become more agile," she told me, "but we're trying to do this in the face of hundreds of years of entrenched tradition." She was looking for a way to fight against that tradition.

And that's a common assumption: People think that mitigating the effects of hierarchy requires working against it. But that's not the case.

Instead, you've got to learn to work with it.

Think about jujutsu, the martial art that specializes in turning opponents' strengths to your advantage. Jujutsu experts excel at disarming opponents much stronger than they are be-

cause they learn to channel others' energies in beneficial directions. (Full disclosure: I don't practice jujutsu, but my executive coach does—and he's always more than happy to pass along its lessons to me.) Done well, a timely jujutsu maneuver can flip a body's momentum against itself.

Strongly rooted, hierarchical structures demonstrate a good deal of momentum. They're difficult to counteract. But since writing *The Open Organization*, I've been thinking about ways leaders might actually use that momentum to spark change.

Proponents of the open organizational model are quick to note hierarchies' shortcomings: Hierarchies are resistant to change. They're often brittle. They don't cope well with outside forces. And they don't really foster collaboration, so they innovate slowly.

But consider their strengths: They're extremely effective at driving efficiency and, once in place, require relatively little upkeep. They make sites of organizational power and influence abundantly clear, and they offer obvious (if rather inflexible) routes for information to travel along organizational lines.

So how might you perform a bit of jujutsu on a hierarchy in order use those strengths to ultimately dismantle the hierarchy? How do you channel a hierarchy's energies to actually cultivate the conditions for openness?

I can think of two ways.

The first is something I attempted with my team at Delta Air Lines. We wanted to increase engagement—to more tightly connect associates to the organization's mission so they felt like they were playing an active and important role in furthering it (a crucial component of open organizations). So we initiated an ongoing survey of everyone in the company. It asked people to respond to the following statement: "I know the company's strat-

egy, and I know what my department can do to make it successful." And by tracking the results by area, we made managers—and their managers' managers—responsible for their teams' responses. Hierarchies excel at driving specific metrics to further their own interests, so we leveraged Delta's hierarchy to point attention to the critical issue of engagement, and we utilized our bureaucracy's strengths to really measure how effective everyone had become at generating that engagement around the company's mission. While we didn't take it quite this far at Delta, imagine what would happen if your response to that prompt determined the size of your manager's bonus?

Here's a second idea: Use hierarchies' strict and clearly-defined chains of command to increase your organization's overall responsiveness. Imagine a company-wide meeting at which you tell all associates: "We need and want your feedback, so you should feel free to email your manager and you should expect to receive a response, after a reasonable period of time, after doing so. And if you don't get one, email me." You've just committed managers to being more responsive to their employees; they'll know that if they don't respond, then their associates' questions are going to move straight up the hierarchy. I tried this once. As you'd expect, the volume of email I received on a daily basis initially increased—dramatically. But almost as quickly as it spiked, the number of incoming messages dwindled. Apparently, people grew tired of my stopping by their offices to ask them why they hadn't responded to the notes they were receiving.

In both cases, my team tried to take the strengths of a rule-following, order-taking, command-and-control system and use them to actually further the interests of the open organization.

Just call it a bit of organizational jujutsu.

This article originally appeared on Opensource.com[18].

18 https://opensource.com/open-organization/16/2/becoming-master-organizational-jujutsu

What it means to be an open source leader

Originally published March 1, 2016

Being an open leader means creating the context others need to do their best work.

That's a relatively short sentence, but for anyone wishing to lead a group in the 21st century, its implications are enormous. And if you're hoping to be one of those people—if you're hoping to have a career leading an open organization—then you must not only understand what it means, but also recognize ways you can put it into practice, so you can build a culture that creates a strategic, competitive advantage for your organization.

Context shapes culture

Culture is something management gurus are increasingly taking more seriously. "Culture eats strategy for breakfast," I've heard people say. But I'm not sure that all of those folks truly understand *why* this is the case.

Despite depictions in popular media, a great company culture isn't simply the result of workplace perks and ping pong tables. Culture is the result of sufficient *context*—a shared set of values, a shared purpose, and shared meanings.

Being a leader in an open organization, then, means making connections: It involves doing the work of linking people both to each other and to some larger, shared picture. It's help-

ing people understand how they can contribute to a collective effort in meaningful ways.

As a leader, you create context when you help everyone in the organization understand its whole mission: the vision, the values—all the elements that define your very reason for existing. An open leader also helps people recognize the vast sum of interactions taking place that make an organization what it is—the aims, goals, and passions that push individuals to work together.

So when we talk about "creating context," we're really talking about bringing these two facets of organizational life together in exciting and productive ways. An open leader aligns passion with purpose, action with vision. And that creates a culture where people feel inspired, motivated, and empowered to do their very best work.

Shaping that culture begins with an emphasis on sharing.

Learn to share

In conventional organizations, "knowledge is power." But in open organizations, that well-worn adage can be a destructive and downright disastrous guiding principle.

Some leaders believe that extending trust and operating transparently will somehow diminish their power. In reality, however, leaders should be sharing as much as they can with their organizations. Sharing information is how leaders begin to build the context that people in an organization need to forge connections between their passions and the organization's mission. Open leaders are honest about the problems they face, the worries they carry, and the limits they possess—because, in the end, the problems leaders face are the problems *everyone* faces. *Shared* knowledge is power.

The problems leaders hear about from customers—the things that keep them up at night—that's the information we need to share with our entire organization. Because when we provide that context and share those problems, we inspire and empower people to help us overcome them. In *The Open Organization*, for instance, I describe how sharing my priority of making Red Hat more customer-focused—and thereby inviting others to help me achieve it—generated unique, creative, and valuable insights from people across the organization.

I've met people who believe "sharing more" actually means "delegating more." But that's not necessarily the case. In the traditional sense, "delegation" involves sharing responsibility for implementing a solution the leader has already dreamed up and settled on. What I'm talking about is different: sharing the work of *actually developing* those solutions, so associates have genuine influence over both the course their work will take and the purpose it will serve.

If this sounds hard, that's because it is. At Red Hat, we put a lot of effort behind hiring for and developing these kinds of leadership capabilities. We take the time to explain them to people, to coach people on what it takes to connect, to be transparent, and to extend trust.

We even talk about what overuse and underuse of these capabilities looks like. For example, we've found that it's important to explain that transparency isn't an excuse for rude behavior, nor does it mean you disclose confidential information about associates or our business. Trust doesn't mean you give people assignments without any direction or context, or that you fail to verify that work they've completed.

Develop your EQ

In an open organization, leaders must be sensitive to nuances—knowing how to share and how to invite collaboration in ways that keep an organization from dissolving into chaos. A leader's mandate to help people do their best work involves not just an understanding of leadership capabilities like connection, trust, and transparency, but also a certain familiarity with—and sensitivity to—the feelings, emotions, and passions of the people that leader is trying to help.

In *The Open Organization*, for example, I discuss the need for leaders to share half-baked ideas with their organizations, to bring plans or concepts to the table before they're fully developed, in order to receive productive feedback sooner. The best leaders can pinpoint precisely when to present a half-baked idea —not so early as to distract people with an idea that may not play out, but not so late as to preclude any opportunity for productive discussion.

Spotting those opportune moments—really sensing them—requires leaders to be in tune with their organizations' emotional atmospheres.

Think about it this way: Great leaders give people enough structure to know they're marching up the right hill, but those leaders don't want to prescribe a single road north, because they need the people making the journey to feel empowered to control that journey. This way, they don't exhaust themselves trying to climb over a massive rock in their way, and instead devise a smarter method for getting around it.

The trick for leaders is providing enough clarity of purpose—enough context—that people are able to help an organization accomplish its goals, but not so much that they're impeded from exercising their creativity and initiative in the process.

Information overload doesn't create context. Distraction doesn't create context. Strong emotional intelligence helps leaders avoid both.

Be a catalyst, not a commander

Deciding to share (and determining how to share) drives open leaders to an important conclusion: a group is always going to produce a better solution than an individual.

Leaders of conventional organizations are commanders. They dictate and prescribe both means and ends, then monitor people to make sure they use the former to achieve the latter.

Leaders of open organizations are catalysts.

Chemistry tells us that a catalyst is an agent that, when added to a mixture, sparks a productive change. This is precisely the role leaders play in open organizations. They create context that invites people into relationships with new (even surprising) results. And they do this because they believe, truly and deeply, that the groups they help form will develop better solutions than the leader could alone.

I won't deny it: Being a leader means constantly being tempted to step in, to force decisions, to *command*. Commanders generally consider collaborative dialogue a grueling waste of time ("I just need to tell people what to do," they say). Sure, they may go so far as to hold meetings about, invite comments on, and ask for feedback regarding their ideas. But in the end, those are empty gestures, because they've already decided that they know what's best.

Catalysts, on the other hand, believe that if they get the right conversations going—if they spark the right kinds of collaboration—then their organizations will realize better results. Leaders can only become catalysts when they let go of the assumption that, categorically, they know best.

Without a doubt, being a catalyst is actually more difficult than being a commander. Since open organizations tend to be meritocracies, in which reputation and a long history of concrete contributions trump job titles as markers of organizational power and influence, leaders must be constantly balancing the skills, personalities, and cultural capital they see in their colleagues. Far from dictating, they need to master the art of making appropriate connections—producing the proper combinations—that ignite the most influential innovations.

Yet being a catalyst is also more rewarding than being a commander. Parents, consider this: Did you feel more proud when you graduated from college, or when your kids graduated from college? If you're like me, the answer is: your kids. Catalysts experience that same sense of pride parents do when they watch those they've helped succeed.

A checklist

So here's a checklist for those hoping to make a career leading an open organization. Being an open leader requires:

- **Willingness** to extend trust and share information
- **Appreciation** for transparency and collaboration whenever possible
- **Sensitivity** to the moods, emotions, and passions of the people that make up an organization
- **Knowledge** of not only *what* to share, but *how* to share it
- **Belief** that groups will consistently outperform individuals working in isolation
- **Trust** in those groups to drive necessary change

Master all this, and you're well on your way to creating the most important thing a leader can provide: the context for people to do their best work.

This article originally appeared on Opensource.com[19] as part of the "Careers in Open Source"[20] series.

19 https://opensource.com/open-organization/16/3/what-it-means-be-open-source-leader

20 https://opensource.com/resources/careers-open-source-2016

Understanding the limits of hierarchies

Originally published March 29, 2016

Sometimes, the fastest route to solving a problem isn't necessarily the best route. That's something I've learned while leading an open organization[21].

Top-down organizations can certainly excel at achieving efficiency—and if efficiency is your ultimate goal, then constructing a hierarchy is a valid way to go. Quite often, a command-and-control-style structure can produce the most accurate version of your vision, and quickly.

But don't expect anything a hierarchy does to pleasantly surprise you. Don't expect it to respond well to forces or events outside of your control. Don't expect it to flourish without your meticulous oversight.

In short, don't expect it to be agile. That's because agility requires an organizational capability to respond and react that top-down, proscribed systems simply cannot achieve. It requires an organization in which every "box" has the latitude and responsibility to react and adjust to a changing environment. That's not something central planning can accomplish. If that sounds messy and chaotic to you, then you're right. But the long term results will surprise you in many positive ways.

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21 https://opensource.com/business/13/1/could-open-source-build-jetliner

Think about a perennial garden in its early days. It looks similarly messy and chaotic. To reach its potential, it will require a good deal of nurturing. But the rewards of keeping a perennial garden can be wonderful. Each year, new colors greet you. New configurations, things you could never foresee or anticipate, surprise you—all because you continued to invest in the activity sprouting there.

Sure, you could plant an annual garden. Doing that would actually take you less time. You could place plants exactly where you wanted them, arrange them in precise ways—control every aspect of the project, from start to finish. The garden might flourish for a bit, but its spectacle would only be temporary. You'd have to start all over again the following year, and the work of replanting everything would fall on you alone.

Leading an open organization—where hierarchy cedes much of its control to dynamic, networked structures—feels much more like maintaining a perennial garden. It involves working more on *conditions* (turning soil, locating those spots in need of watering) than it does on dictating direction. It means *creating the context* for things (things you might not have considered or even imagined) to occur.

And on top of that, tending to your networks is going to produce the best-performing results—every time. Because when you've entrusted your associates to grow and evolve their work in the ways they see fit, you're going to enjoy more robust and effective solutions. You'll also see speedier, more flexible ones. As I say in *The Open Organization*, networked structures more easily facilitate what US Air Force colonel John Boyd calls the "OODA loop"[22]; they allow for quicker reactions to immediate, pressing situations. Hierarchies might let you make one-off deci-

22 https://en.wikipedia.org/wiki/OODA_loop

sions at a faster rate, but, ultimately, they're just not as responsive in the long term.

Take what is probably the oldest participative, open system—the United States' legal system—for example. Today, that system is incredibly subtle and nuanced; it's highly adaptable and constantly evolving. But building it required hundreds of years of painstaking work: maintenance, upkeep, and tiny iterations in response to local, contextual changes. The system is built on legal precedent after legal precedent, opinion after opinion, and has emerged organically. You could dictate a legal system from above—"hatch" one fully-formed in a shorter amount of time—but it wouldn't be nearly as adept at addressing real-world complexity.

Or, to use another example (one much closer to Red Hat's core business): take the Linux kernel. Today, it stands as the very best solution to a growing number of technological problems, but it didn't spring from a single person's head overnight. *Decades* of work made it the flexible, superior solution it is today. Local improvements and impassioned debates between key stakeholders continue to refine it.

Yes, sometimes you'll need to achieve an objective with maximum efficiency. We occasionally do at Red Hat. Rather than activate the rich culture of our various networks to grow the best solution, we opt for streamlining and expediting one. But we're always aware of the sacrifices we make by doing so.

Because most often, the fastest solution isn't the best one. Bear that in mind the next time you start feeling frustrated by your network's slower pace of execution. When you're ready to reap what you've sewn, you'll be happy you did.

This article originally appeared on Opensource.com[23].

23 https://opensource.com/open-organization/16/2/fastest-result-isnt-always-best-result

Appreciating the full power of open

Originally published May 3, 2016

Last year was a big year for open source. As *Wired* put it, 2015 was the year open source software "went nuclear[24]." More people than ever seem to realize the power of open—not just as a programming methodology, but as a better way to accomplish just about anything.

Of course, as the term "open" gains popularity, its meaning shifts. Sometimes, it shifts so much that we risk overlooking precisely what's making it incredibly important today. If you want to help your organization leverage the power of open, it may be helpful if everyone understands and appreciates what makes the open source way so special.

In my mind, something is open when it emphasizes in equal measure the qualities of sharing, collaboration, and transparency.

Share and share alike

Sharing something (like a line of software code, your favorite recipe, or an idea) is a prerequisite for making it open. A group of people working together will always produce a better result than any one person working in isolation. To work to-

24 http://www.wired.com/2015/12/2015-the-year-that-open-source-software-went-nuclear/

gether, groups must share their ideas, insights, suggestions, and failures.

While this may sound obvious, it's also very difficult to do, especially in an economic and cultural climate that tends to promote individual ownership and celebrate singular creators[25]. People tend to fear that sharing will somehow diminish their own power or authority. "Why should I share," they think, "when I could benefit from controlling access to something valuable?"

Maybe they guard their recipes and only share finished dishes. Maybe they license their software restrictively or keep its source code secret. Whatever the means, people seem reluctant to share, and they worry they'll lose something by doing so.

Open source communities have taught us that this just isn't true. Sharing something often increases its value, because sharing allows more and more smart, creative people to get their hands on it. The value actually increases as you remove restrictions to sharing—if you share as much as you can with as many people as you can. That means sharing your instructions, your recipe, your source code, and opening it up to everyone, not limiting access to certain persons, groups, or "fields of endeavor," as the Open Source Initiative puts it[26].

But as important as sharing is, sharing alone is not enough to make something open. I've watched some people claim they're sharing simply by giving an already-finished product away for free. You sometimes see this with various open education initiatives, where content creators share courses by making them available for public consumption online. While this certainly is a nice gesture, these initiatives don't necessarily en-

25 https://hbr.org/2016/04/its-time-to-bury-the-idea-of-the-lone-genius-innovator

26 https://opensource.org/osd

courage or even allow others to reuse, modify, or share the materials in turn.

That's why, when it comes to being open, sharing and collaboration go hand in hand.

Collaborate to innovate

Openness is a surefire path to better and faster innovation. But innovation, by definition, involves change. Innovation occurs only when people feel a certain freedom to manipulate, experiment, and tinker. Something is open not only if it's shared or available, but also when it's collaborative or manipulable.

At its core, collaboration involves joint work. It's undertaking something together with the understanding that working this way will produce superior results. Collaboration also implies a certain attitude toward failure—"openness" to it, you might say. When we collaborate, we open not only our products to continual revision and refinement, but also ourselves to feedback and critique. Open source communities' ability to rapidly prototype, for example, wouldn't be possible without this spirit of collaborative openness.

When you share without collaborating, you're missing something important. It's the intent and mindset behind an act of sharing that fosters openness. Think about it this way: Are you sharing something just because you want other people to accept, embrace, or adopt it in its final form? Or are you sharing it because you're inviting them to work on it with you? To remix it? To modify, adapt, repurpose, or grow it? The content might be open in the sense that it's freely shared or distributed. But we've all seen examples where a creator's attitude is clearly closed to the possibility of others using that content as the basis for further innovation.

I call this an "attitude" specifically to point out that openness is more than a licensing issue[27]. It's a cultural issue, something that can be rooted in an individual's mindset and an organization's DNA. People can try to make something open by sharing it widely—yet, at the same time, they can be reluctant to allow others to modify, adapt, or build on what they're sharing. They aren't "open" to that.

Yet even combining sharing and collaboration still doesn't fully capture the power of open. Transparency is essential, too.

Transparent thinking

Something is transparent when anyone can view its inner workings. In the software world, transparency is at work when people publish the source code for their programs so others can see exactly how those programs operate, then learn from them and scrutinize them for insecurities or inefficiencies. But transparency is obviously crucial outside the domain of software, too.

The open government movement, for example, emphasizes transparency of decision-making practices, the idea that everyone should be aware of the processes by which something important gets implemented or altered. So something is open if it's transparent (if everyone can see how it works, how it's put together, and how it came to be the way it is).

For this reason especially, transparency is closely related to accountability. When something is transparent, anyone can tell who's responsible for it. At Red Hat, we care deeply about accountability. In fact, it's one of our core values. Quite simply, transparency helps keep people honest. It ensures that people in an organization own their decisions and actions. And it's inte-

27 https://opensource.com/life/14/6/5-myths-about-working-collaboratively

gral to openness because without it people don't have the knowledge they need to make the impact they're trying to make, or they're not able to fully contribute to the best of their abilities.

It's important to realize, though, that transparency doesn't guarantee much on its own. People can be utterly transparent about decisions or ideas even while they're forcing them on others. They can make their rationale clear without any inclination that they're open to changing their minds about it.

Likewise, leaders can claim to value transparency—and even act on those claims—without feeling any obligation to let it affect them. In *The Open Organization*, I critique the "suggestion box" approach to transparency, where leaders invite others to openly (that is, transparently) submit their comments, questions, and suggestions about ways an organization can improve. I understand and appreciate the spirit of the gesture, but nothing about it guarantees leaders will actually read, let alone act on, those suggestions.

Necessary, but not sufficient

While each of these qualities is important, none in isolation is adequate for completely encapsulating the power of open. You must consider them all collectively, as a unit. Essentially, we might say that all are *necessary* for openness, but none, by itself, is *sufficient* to create openness.

When you promote transparency in the absence of collaboration or sharing, you get a suggestion box. People are clear on what you're doing, but they aren't invited to participate in shaping what you're doing (so it's less valuable to everyone).

Sharing without transparency or collaboration is possible, too. Think of a situation where people work on software projects in secret, then "throw them over the wall" to an unsuspecting

community that's completely unprepared to receive them. Not much value there, either.

And collaboration without sharing or transparency occurs when leaders invite others to work on part of a project while withholding key information about that project (maybe even the reasons they're working on the project in the first place).

I don't consider any of these situations to be truly open—and I'm honestly not sure they create the most value for anyone involved.

Open is more than a simple synonym for sharing, collaboration, and transparency. Open encompasses the power of all three forces working together in tandem.

Combined with our mindset and our actions, it yields extraordinary results.

This article originally appeared on Opensource.com[28]*.*

28 https://opensource.com/open-organization/16/4/appreciating-full-power-open

Epilogue

How I discovered Linux's true power

Originally published September 29, 2015

My Linux story begins like that of so many others—with an old computer and a desire to tinker.

It was the late 1990s when I read an article about a UNIX-like operating system, "Linux," I could download and install for free. When I was a computer science major in college, my classmates and I regularly used Solaris to learn computing with UNIX. But we never had complete control over that technology. I remember we couldn't explore it the way we would have liked.

This thing called "Linux" promised something different, a kind of openness and flexibility that seemed like the perfect prescription for my ailing laptop at the time. So I took the plunge, installed Slackware, and began using Linux.

That use and familiarity with Linux would prove incredibly valuable when I was treasurer at Delta Air Lines. Beyond my role, I was genuinely interested in how people flew, why they flew, why they made the connections they made, why they chose nonstop flights over other options, and how much they tended to pay for nonstop flights as opposed to others. I decided to review a year's worth of Delta's network data to gain some insight into passenger psychology. (A quick aside: Many people aren't aware that airlines must record data from every 10th ticket they sell—the U.S. Department of Transportation makes this data available to the public as a free download.)

But I encountered a problem: the data set I wanted to analyze was larger than 4GB, and back then Windows computers

couldn't handle files of that size. So, I moved all my data to a Linux machine where I could work with it the way I wanted. Linux enabled work that would have been impossible on other platforms. It allowed me to glean insights I would never have been able to otherwise. It helped me provide value to the company (and that saw me promoted to chief operating officer).

Not only did Linux free my data, it also helped me advance my career.

And yet even when I joined Red Hat in 2007, I continued to underestimate Linux's true power. I still considered "software freedom" principally a matter of price; I thought, as others have put it, that the "free" in "free software" meant "free as in beer" (in other words, that the value of free software was its extremely low cost for users). Eight years later, working at Red Hat has radically altered my perspective on multiple ideas (including the most effective way to run a company, as I detail in my new book!), and my views on software freedom are not least among these.

Only after spending time at Red Hat did I begin to truly understand the meaning of "free software"—that software should be "free as in speech," that it should be something we share, something on which we openly collaborate as we make the world a better place. At Red Hat, I quickly realized I was leading a company driven by something other than the profit motive. Like so many people attracted to Linux, I came for the technology, but stayed for the philosophy.

In my years at Red Hat, I've witnessed firsthand the kind of excitement Linux can generate. At an event in Brazil, for example, the Brazilian president wanted to meet with me to express his interest in open source technologies and principles. The same thing happened during a trip to Poland, when the Polish prime minister learned of my visit and asked to meet with

me to discuss Linux. Something about the open source movement unites people across all kinds of boundaries, including political and geographic ones.

In the technology world today, Linux has become the platform around which innovative people are building the next generation of computing. People are building the most exciting applications, languages, and frameworks to run on Linux. It's the default platform for burgeoning technological ecosystems around problems like big data, mobile, and analytics. Without Linux, all this activity simply wouldn't exist.

As I sit and write this, I can glance around the room and spot five notebook computers all running different Linux distributions. And the computer I have in front of me is running Fedora 22. They'll all come in handy as I pursue my next Linux-related goal: acquiring my Red Hat Certified Systems Administrator certificate.

I guess you could say I'm still tinkering.

This article originally appeared on Opensource.com[29] as part of the "My Linux Story"[30] series.

29 https://opensource.com/life/15/9/jim-whitehurst-linux-story

30 https://opensource.com/tags/my-linux-story

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Additional resources

The Open Organization Field Guide

How are open source principles changing the way we work, manage, and lead? Find out in *The Open Organization Field* Guide, a community-produced companion to *The Open Organization*. Download it for free at opensource.com/open-organization/resources/field-guide.

Discussion guides

Want to start your own *Open Organization* book club? Download free *Open Organization* discussion guides for help getting started. Just visit opensource.com/open-organization/resources/guides.

#OpenOrgChat

Our community enjoys gathering on Twitter to discuss the future of management. Find the hashtag #OpenOrgChat, check the chat schedule at opensource.com/open-organization/resources/twitter-chats, and make your voice heard.

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, located at opensource.com/open-organization/resources/faq.

The *Open Organization* email list

Our community of writers, thinkers, practitioners, and ambassadors regularly exchange resources and discuss the future

of work, management, and leadership. Chime in at www.redhat.-com/mailman/listinfo/openorg-list

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About the author

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