Holacracy® Taster Day

Presented by: Anna McGrath

PURPOSE
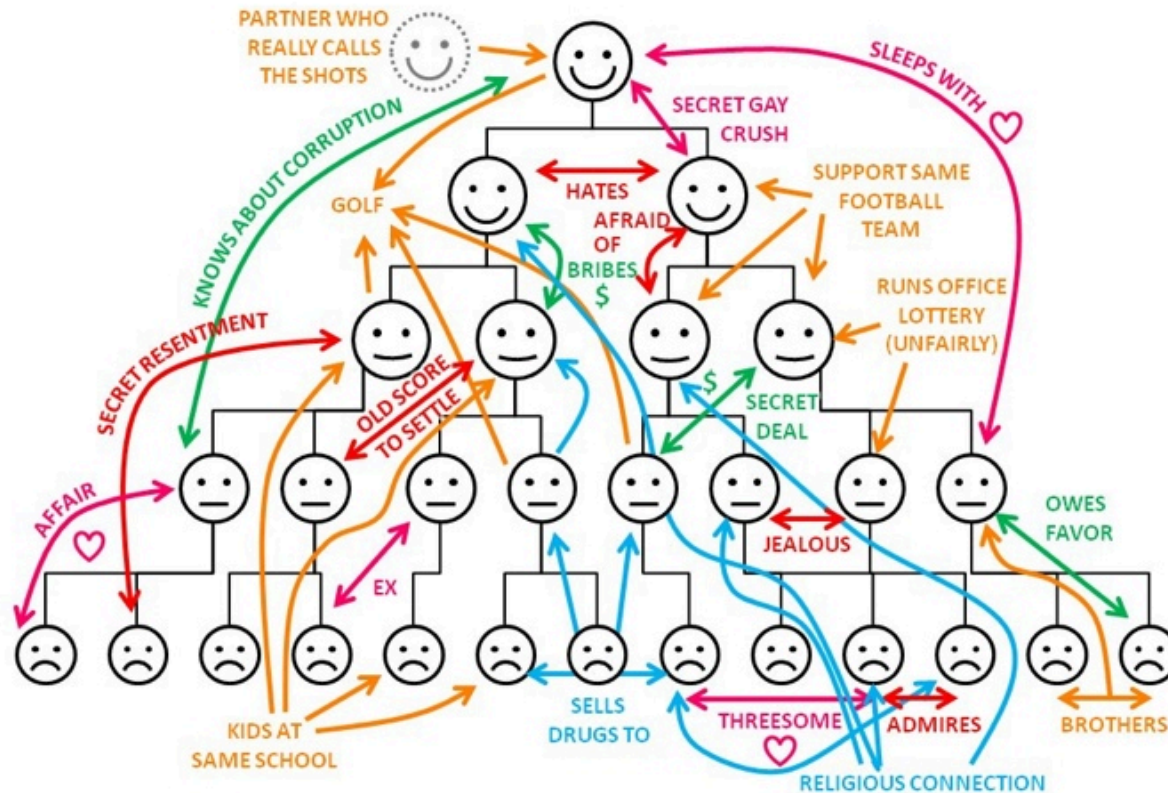
Delivering on Your Organization's….

Agenda

❏ Introduction to Holacracy®

    ❏ Tensions

    ❏ Processing Tensions

    ❏ Dynamic Steering

❏ Meetings; Traditional Challenges vs. Holacracy Solutions

    ❏ Tactical Meeting Process

❏ Governance Meeting Process

❏ Q&A

❏ Wrap up

Hierarchical Challenges
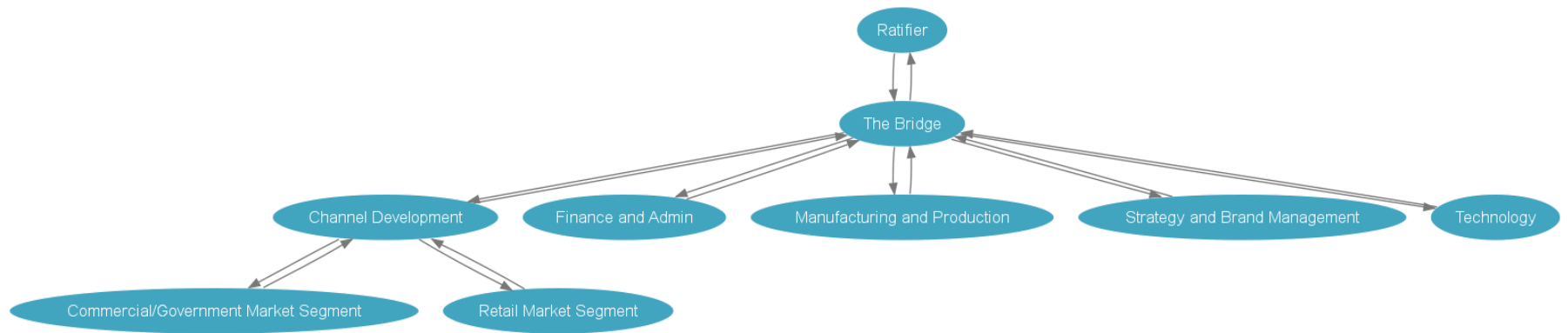

REAL ORGANISATION CHART

Holacratic Organization

Pantheon Enterprises, Inc

Purpose: Intentionally Innovating To Serve The Greater Good

Circles

Challenges to Address

A
L
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Rigidity

Lack of Initiative

Chaos

Overwhelm

Painful Meetings

{Bureaucracy}

Difficulty with Change

Lots of Talk, Lack of Decisions

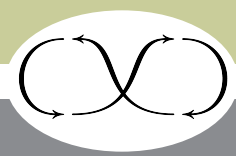Unclear Decision-Making

Fear

Analysis Paralysis

Politics

Communication Issues

Culture of "Nice"

12 Leadership Polarities

from Polarity Partnerships

I believe that the central leadership attribute is the ability to manage polarity.

-- Peter Koestenbaum

Control	AND	Empowerment
Task	AND	Relationship
Structure	AND	Flexibility
Responsibility	AND	Freedom
Conditional Respect	AND	Unconditional Respect
Project Planning	AND	Taking Action
Individual	AND	Work Group
Focused	AND	Expansive
Candor	AND	Diplomacy
Logic	AND	Creativity
Analysis	AND	Encouragement
Confidence	AND	Humility

Mapping – Content Guide

GPS = Greater Purpose Statement
Why?
Result of both
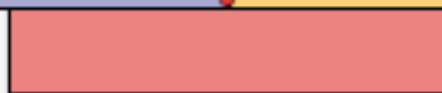upside quadrants

Positive
Results of
Focusing on
the Left Pole

Neutral or
Positive
Name of
Left Pole

Negative
Results of
Over-focusing
on **Left** Pole to
the Neglect of
Right Pole

Positive
Results of
Focusing on
the Right Pole

Neutral or
Positive
Name of
Right Pole

Negative
Results of
Over-focusing
on **Right** Pole
to the Neglect
of **Left** Pole

1.
2.
3.

and

1.
2.
3.

1.
2.
3.

1.
2.
3.

Deeper Fear
Result of both downside
quadrants

* Thanks to John Scherer, Center for Work and the Human Spirit

Mapping – Content Guide

GPS = Greater Purpose Statement
Why?
Result of both
upside quadrants

Great Work Culture *

Positive
Results of
Focusing on
the Left Pole

1. Work gets done

1. Individuals feel respected

2.

2.

3.

3.

Positive
Results of
Focusing on
the Right Pole

Neutral or
Positive
Name of
Left Pole

Task **and** Relationship

Neutral or
Positive
Name of
Right Pole

Negative
Results of
Over-focusing
on **Left** Pole to
the Neglect of
Right Pole

1. Individuals feel disrespected

1. Work is delayed

2.

2.

3.

3.

Negative
Results of
Over-focusing
on **Right** Pole
to the Neglect
of **Left** Pole

Toxic Work Culture

Deeper Fear
Result of both downside
quadrants

* Thanks to John Scherer, Center for Work and the Human Spirit

Holacracy® is………

… a way to support organizations in **leveraging polarities**

… a new **power structure,** vested in a **constitution**

… a **practice**, not a theory or model

… in service of the organization's **Evolutionary Purpose**

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Partial List of Those Practicing Holacracy® ………

… Zappos (& Las Vegas Downtown City Project)

… Conscious Capitalism (Association)

… David and Co (Getting Things Done®)

… Dev Bootcamp (Education - Software Developers)

… Pantheon Chemical (eco-chemical company)

… Maestro Conference (Social Conferencing)

… Three Stone Hearth (Cooperative – Community Kitchen)

… IMC2 (Strategic and Creative Agency)

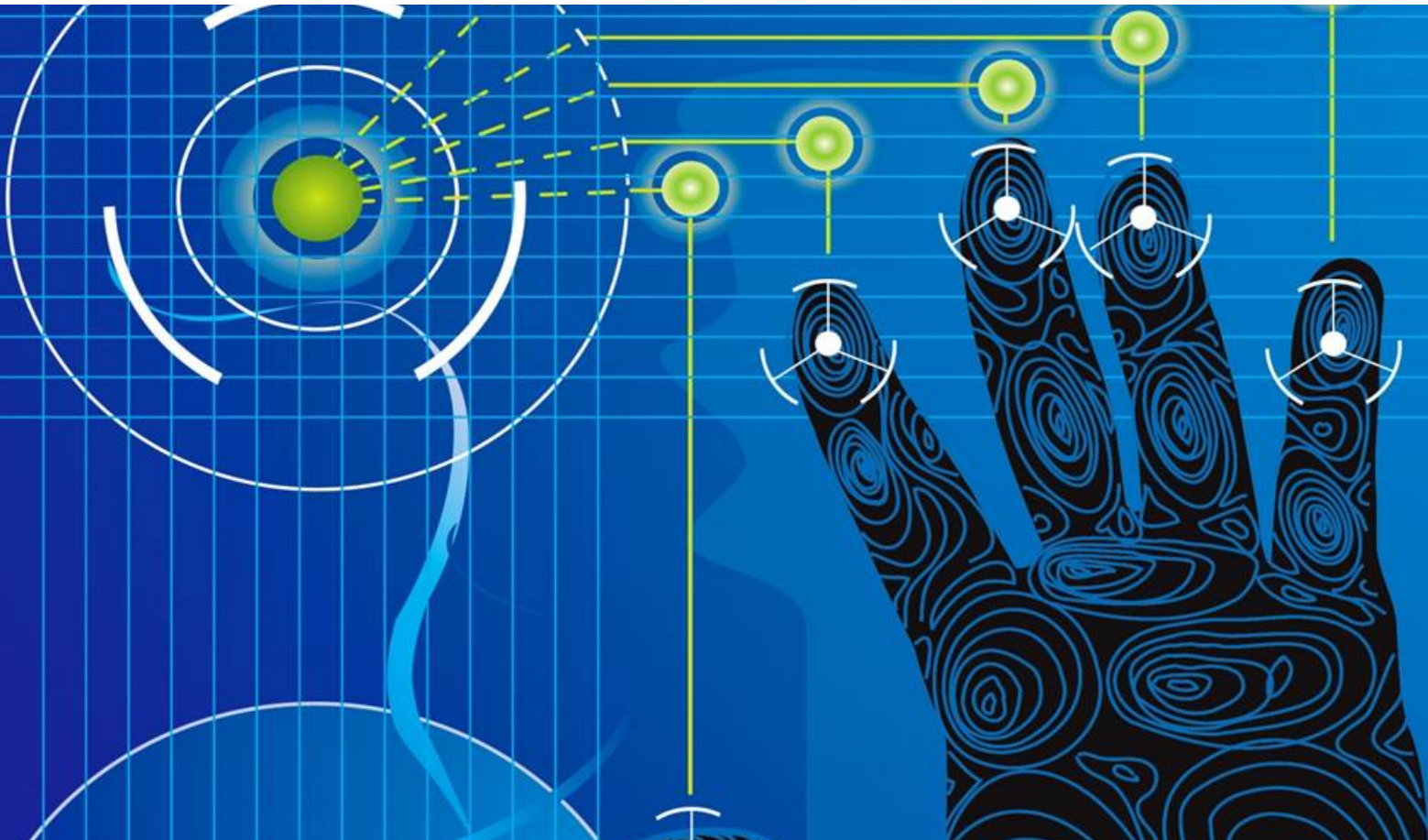**… Kahler Financial (Integral Wealth Advisory)**

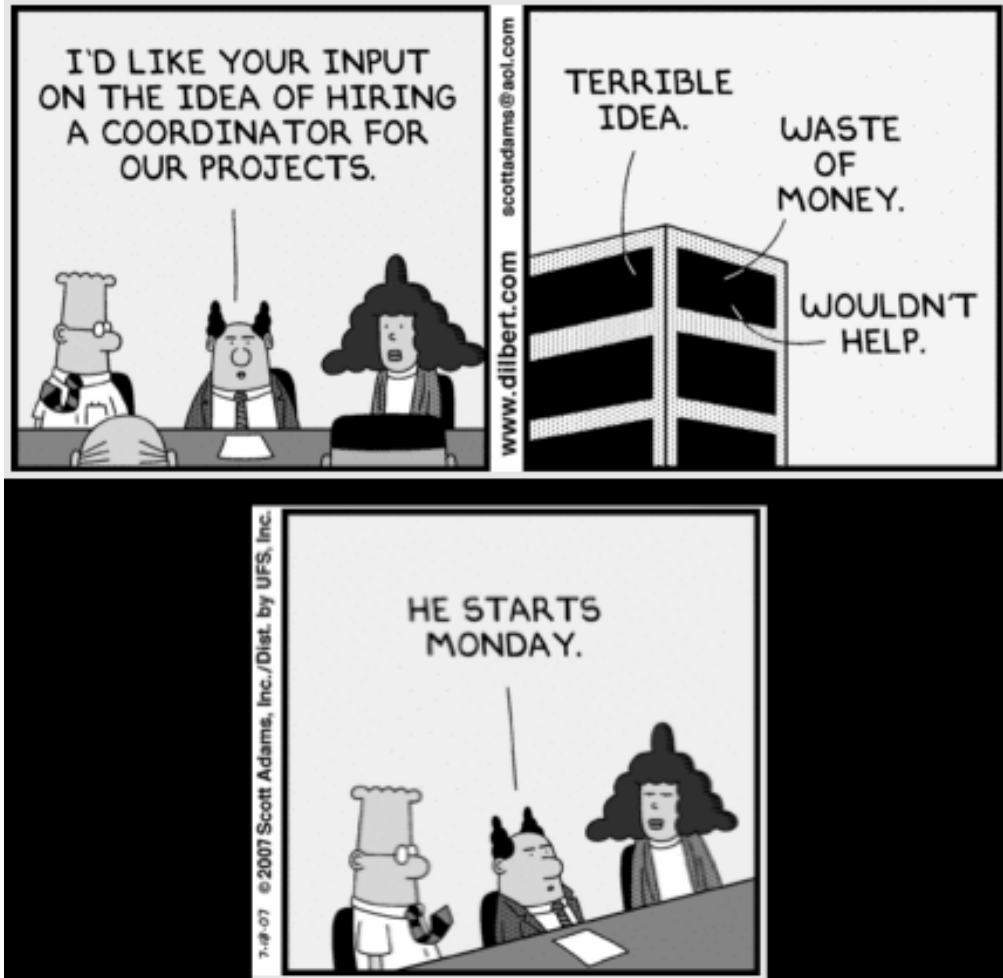**… Obvious Corp / Medium (Consumer Web Applications)**

Flying with All Your Instruments…

Sensors

The Goal: Anything, sensed by anyone, anywhere in the company, can get rapidly & reliably processed into meaningful change…(if relevant to the purpose.)
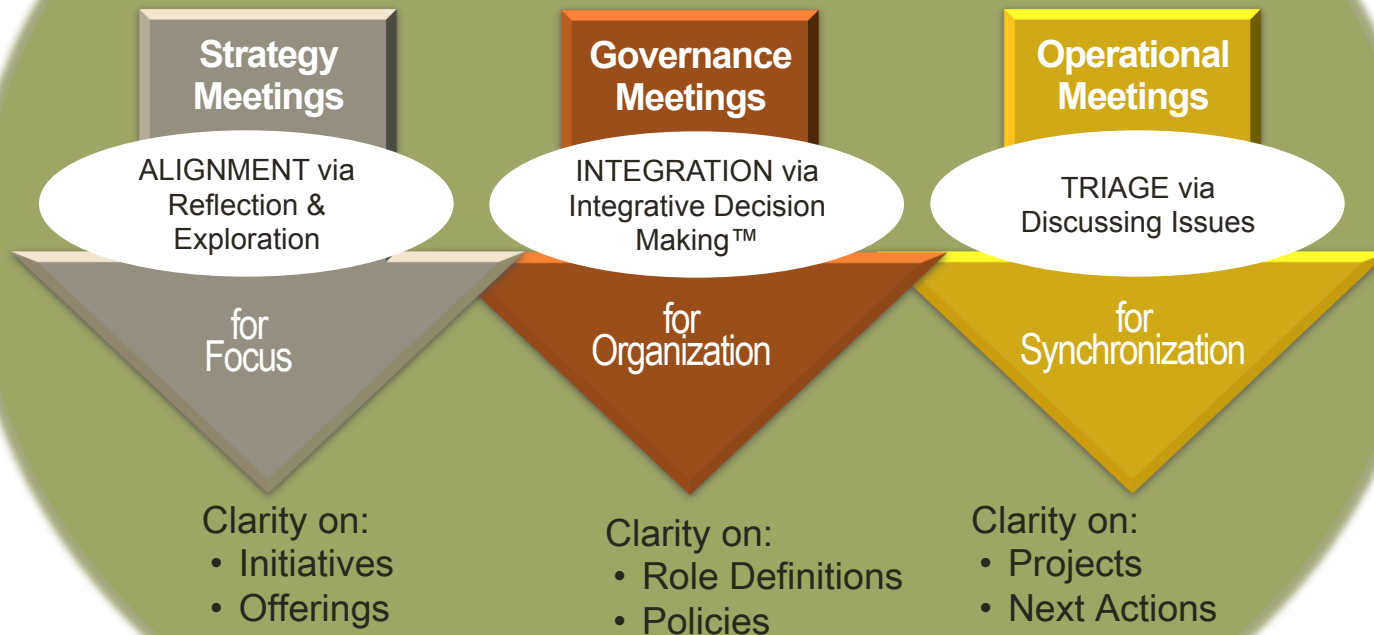
Sensing Tensions

is   could be

The Power of Processing Tensions…

Tension, *n.*: The sense of a specific gap between what is and a potential

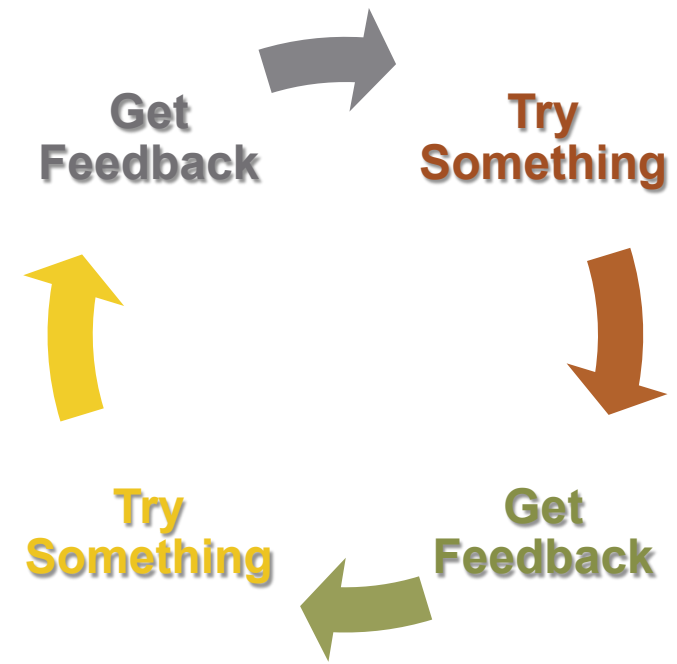From **Predict & Control** to **Sense & Respond**

Sense and Respond

Shift to "Dynamic Steering"

- Make *workable* the threshold for decisions/plans

- Any issue can be revisited at any time

- Delay decisions to the last <u>responsible</u> moment

- Deliver *fast*, in small increments – get feedback

Get Feedback

Try Something

Try Something

Get Feedback

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Working In vs. **Working On** the Organization

Operations vs. **Governance**

Let's Try It: Simulation Setup

Welcome to "**The Better Way Company**"
Provides training & coaching for the "Better Way" method…

The company has just adopted Holacracy
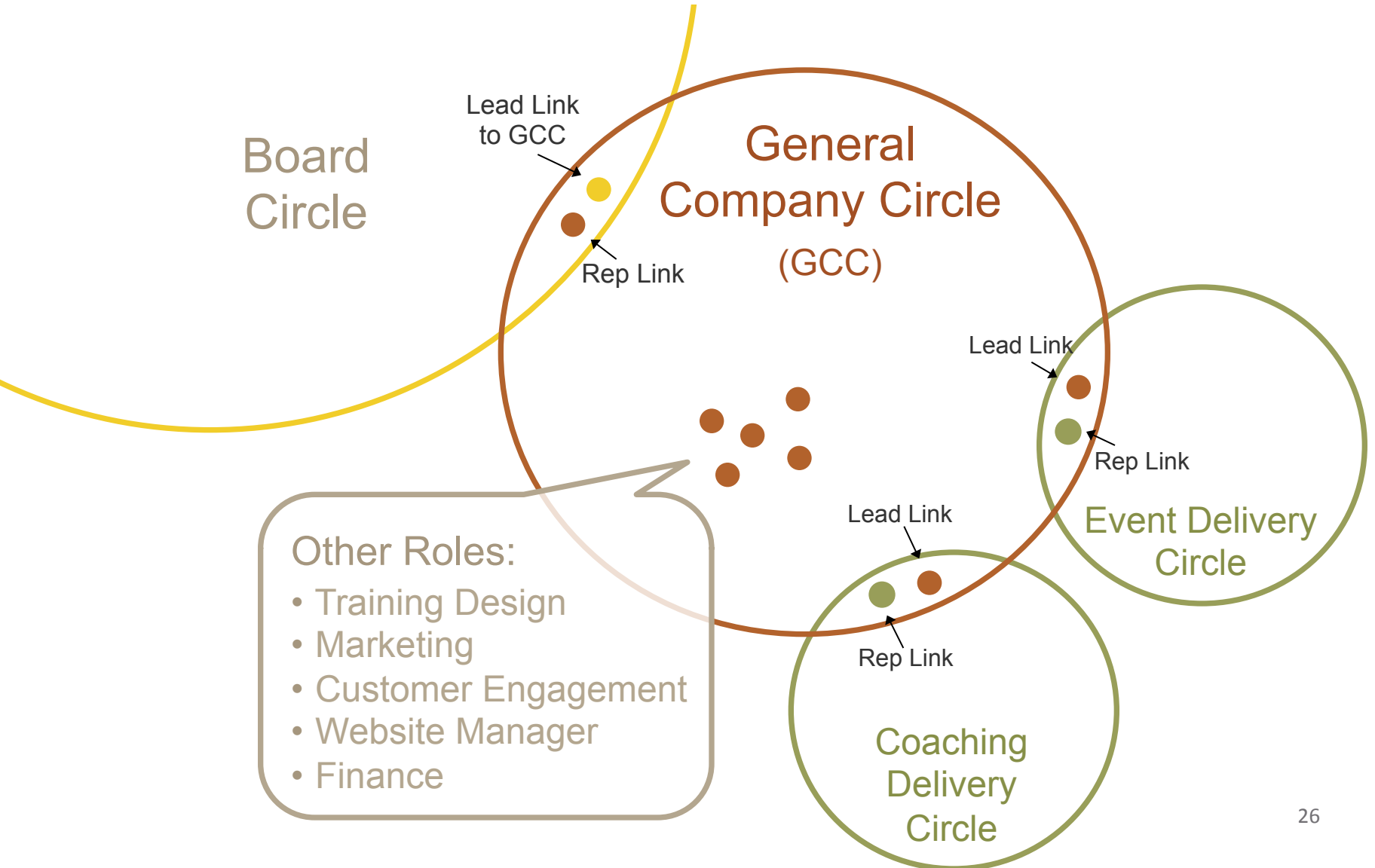… and there are lots of tensions to process …
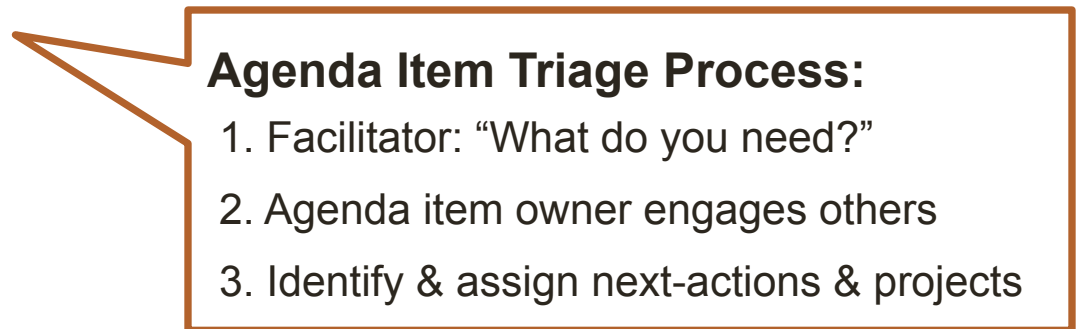
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Five Stages of Learning

1. Hear
2. Study
3. Understand
4. Practice
5. Embody

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The Better Way Company

Board
Circle

Lead Link
to GCC

Rep Link

General
Company Circle
(GCC)

Lead Link

Rep Link

Event Delivery
Circle

Other Roles:
• Training Design
• Marketing
• Customer Engagement
• Website Manager
• Finance

Lead Link

Rep Link

Coaching
Delivery
Circle

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Tactical Meeting Agenda

- Check-in Round

- Administrative Concerns

- Checklist Review

- Metrics Review

- Project Updates

- Agenda Building

- Triage Issues
  - Issue #1
  - Issue #2

- Closing Round

Outputs:
- Projects
- Next-Actions

Agenda Item Triage Process:

1. Facilitator: "What do you need?"

2. Agenda item owner engages others

3. Identify & assign next-actions & projects

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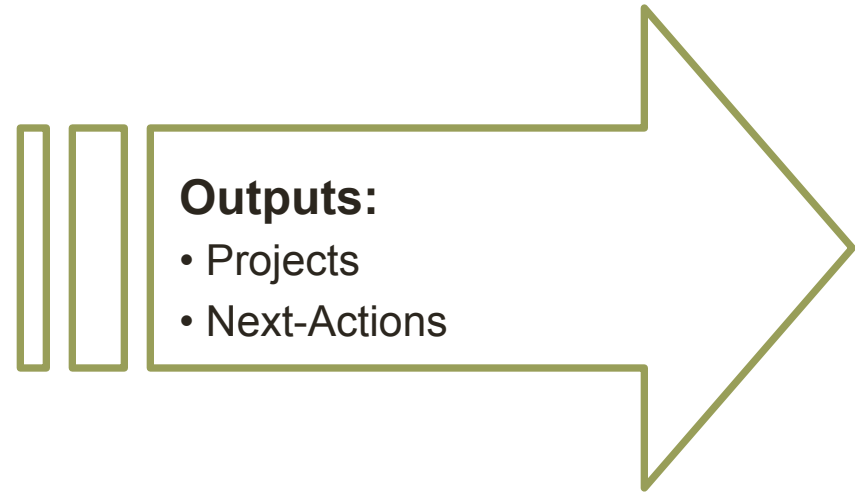
Triaging Tensions: What do I need to resolve my tension?

- Capture a next action step or project for me or another role

- Share something, i.e.) a project update not listed on the project board

- Request an open discussion

- Capture an action to take an item to governance

- Share an appreciation or feedback

- Request a reaction round after I share something with the circle

- Other

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Checklist

- ☐ Backup Website & Database
  Website Manager, Weekly
- ☐ Pay Bills
  Finance, Monthly
- ☐ E-mail Mailing List
  Marketing, Monthly
- ☐ Schedule Next Workshop
  Event Delivery RL, Monthly

Metrics

	Dec	Jan	Feb
Website Hits *Website Manager*	8,500	9,000	
Sign-ups for Next Event *Event Delivery*	30	36	
# Coaching Clients *Coaching Delivery RL*	22	21	
Support Cases Handled *Customer Service*	49	51	
Revenue *Finance*	$180k	$150k	

Projects

Tax Returns Filed & Paid
Finance

New Blog Published
Marketing

New FAQ Published
Customer Engagement

DISCUSSION Forums Live
Website Manager

Advanced Training Launched
Training Design

New Webinar Scheduled
Marketing

New Coaches Fully Trained
Coaching Delivery LL

Intro Event redesigned
Training Design

The Operational "Corkboard"

Working In vs. **Working On** the Organization

Operations vs. **Governance**

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Government

of the **People**

by the **People**

for the **people**

Governance

of the **Organization**

through the **People**

for the **Purpose**

Questions of Governance

Governance = Organization Structure

■ 3 definitions of "structure" for any organization:

- ○ Formal Structure (the org chart & job descriptions)

- ○ Extant Structure (the one actually operating)

- ○ Requisite Structure (the natural one, "wants to be")

Don't design the formal structure…
… *evolve it* by processing tensions.

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Governance Outputs (Structure)

- Role Definitions
- Policies
- Elections

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Components of a *Role*: (e.g."Marketing")

- Purpose: (why it exists; what it aims to manifest)
  - Generate buzz about WonderWorks' Holacracy Implementations and Conscious Leadership Programs

- Domain: (grants control; a property right)
  - The Organization's Public Website
  - All Social Media Accounts & Pages

- Accountabilities: (defines expectations & authorities)
  - Promoting and marketing the company's overall offerings
  - Orchestrating public speaking engagements & similar PR

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Governance Meeting Process

- **Check-in Round**

- **Administrative Concerns**

- **Agenda Building**

- **Process Agenda**
  - Item #1
  - Item #2

- **Closing Round**

**Primary Outputs:**
- Roles Definitions
- Policies

Integrative Decision Making Process:
1. Present Proposal
2. Clarifying Questions
3. Reaction Round
4. Amend and Clarify
5. Objection Round
6. Integration (if needed)

Go back to Objection Round ↱

Integrative Decision-Making Process

■ Present Proposal

■ Clarifying Questions

■ Reaction Round

■ Amend and Clarify

■ Objection Round

■ Integration (if needed)

◆ Amend proposal to integrate objections
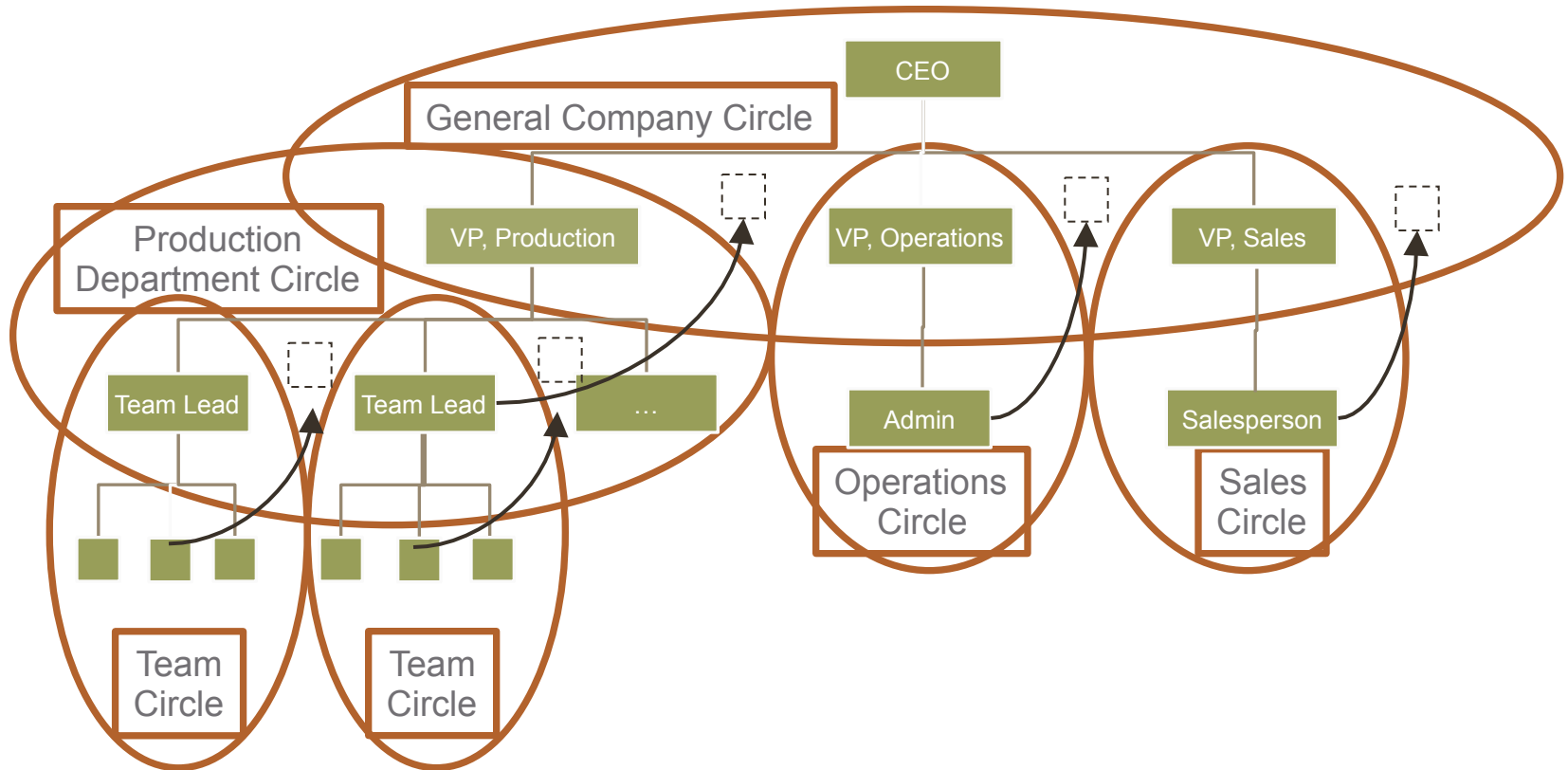
◆ Go back to Objection Round with amended proposal

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Distributed Authority at Scale:
Organic Structure
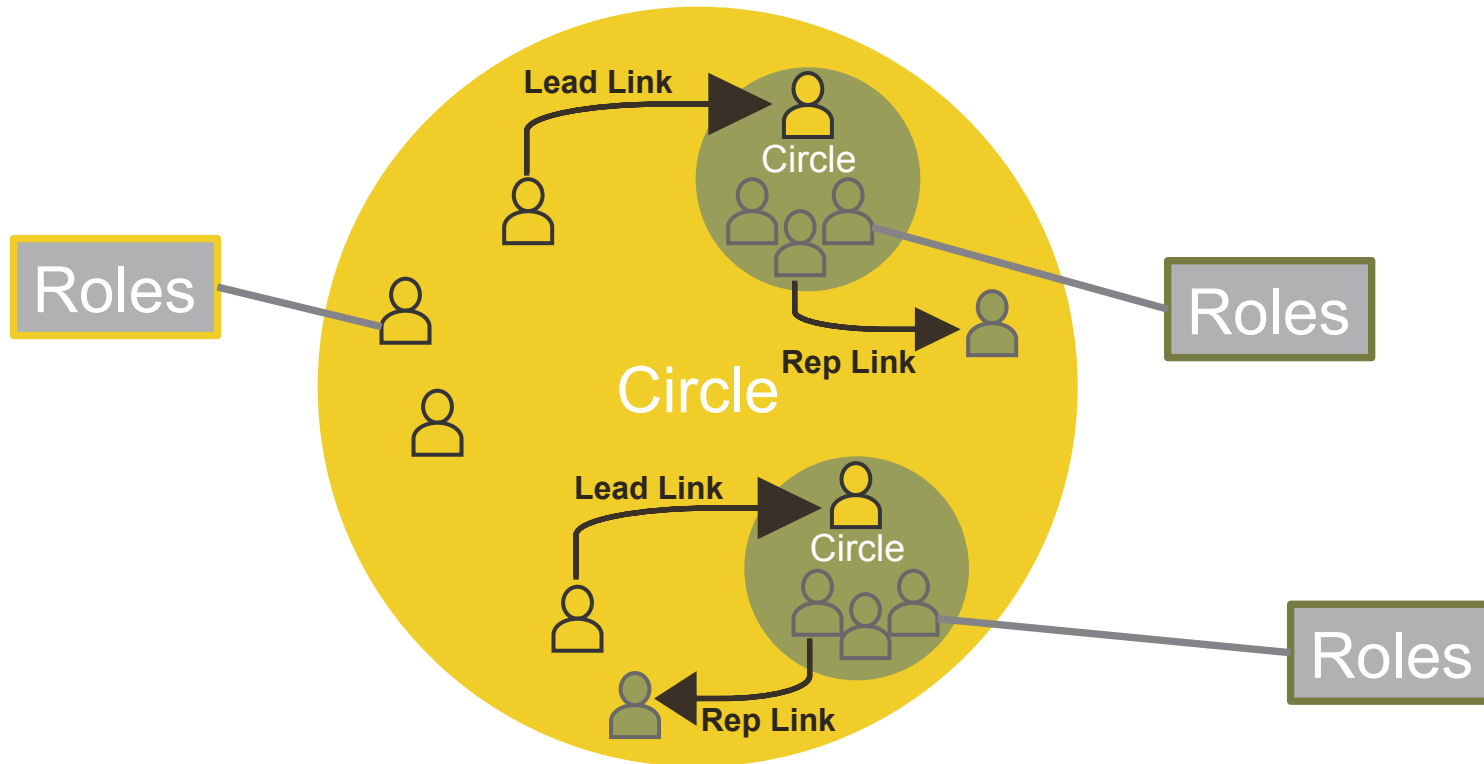
Distributed Authority at Scale:
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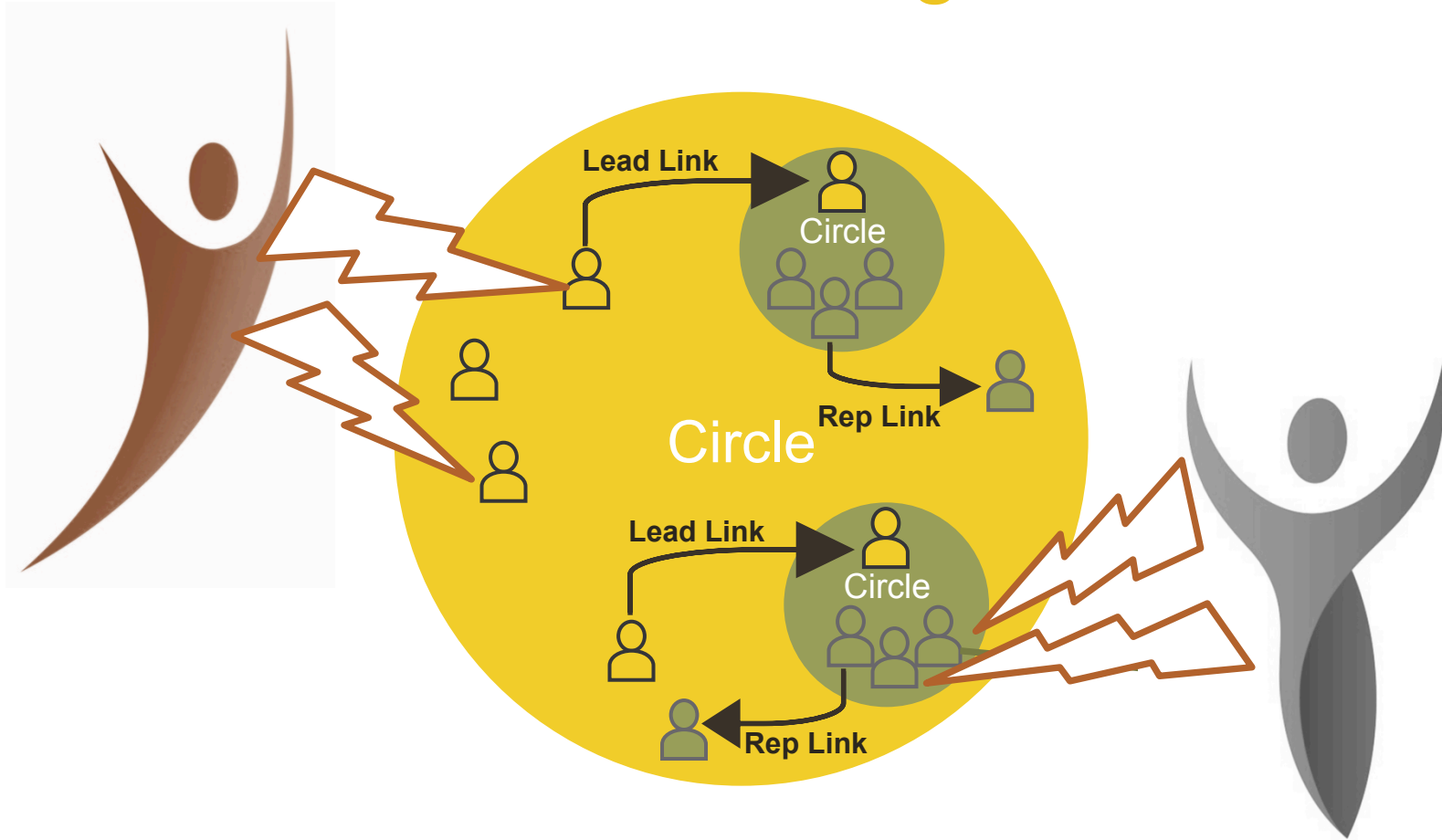
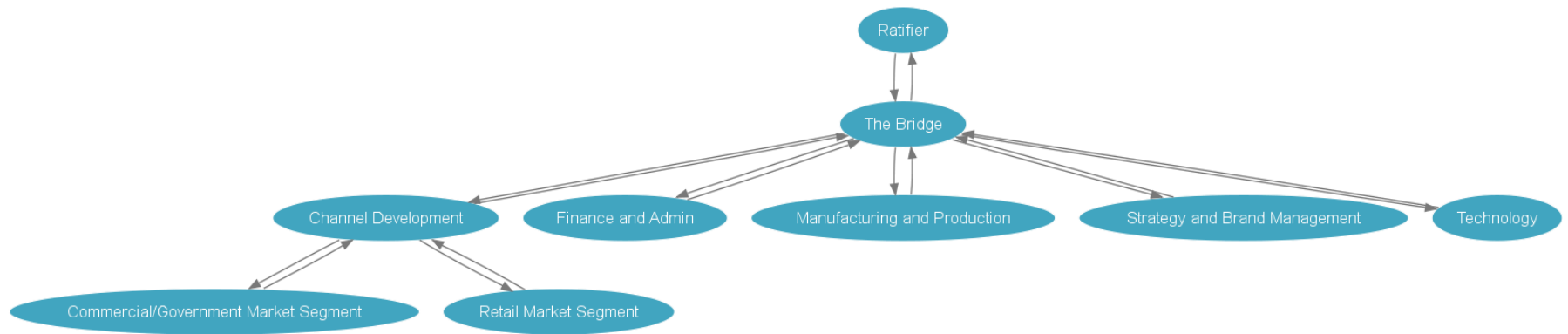# From Hierarchy to Holacratic Structure
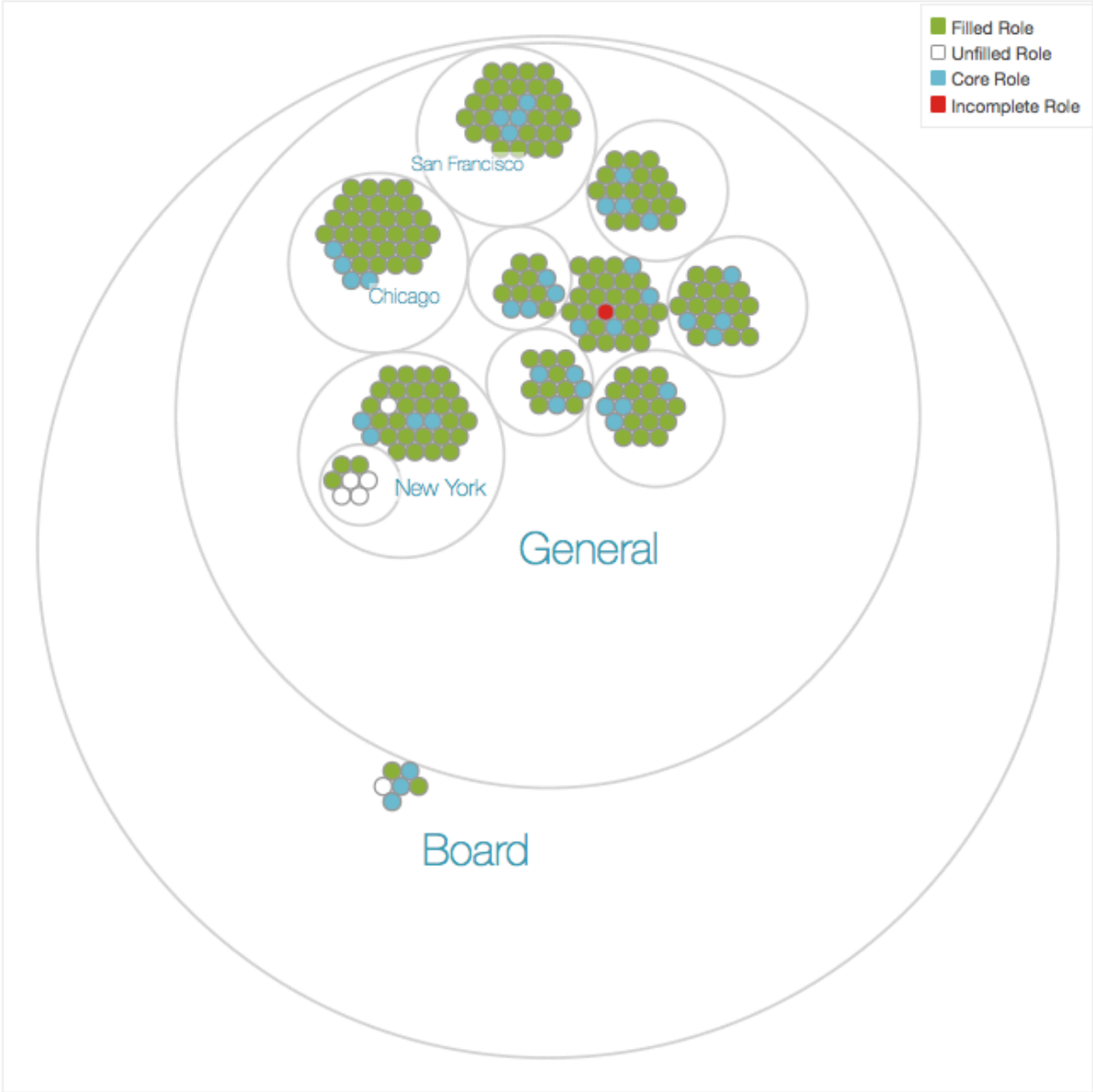
A Holacratic Organization

Pantheon Enterprises, Inc

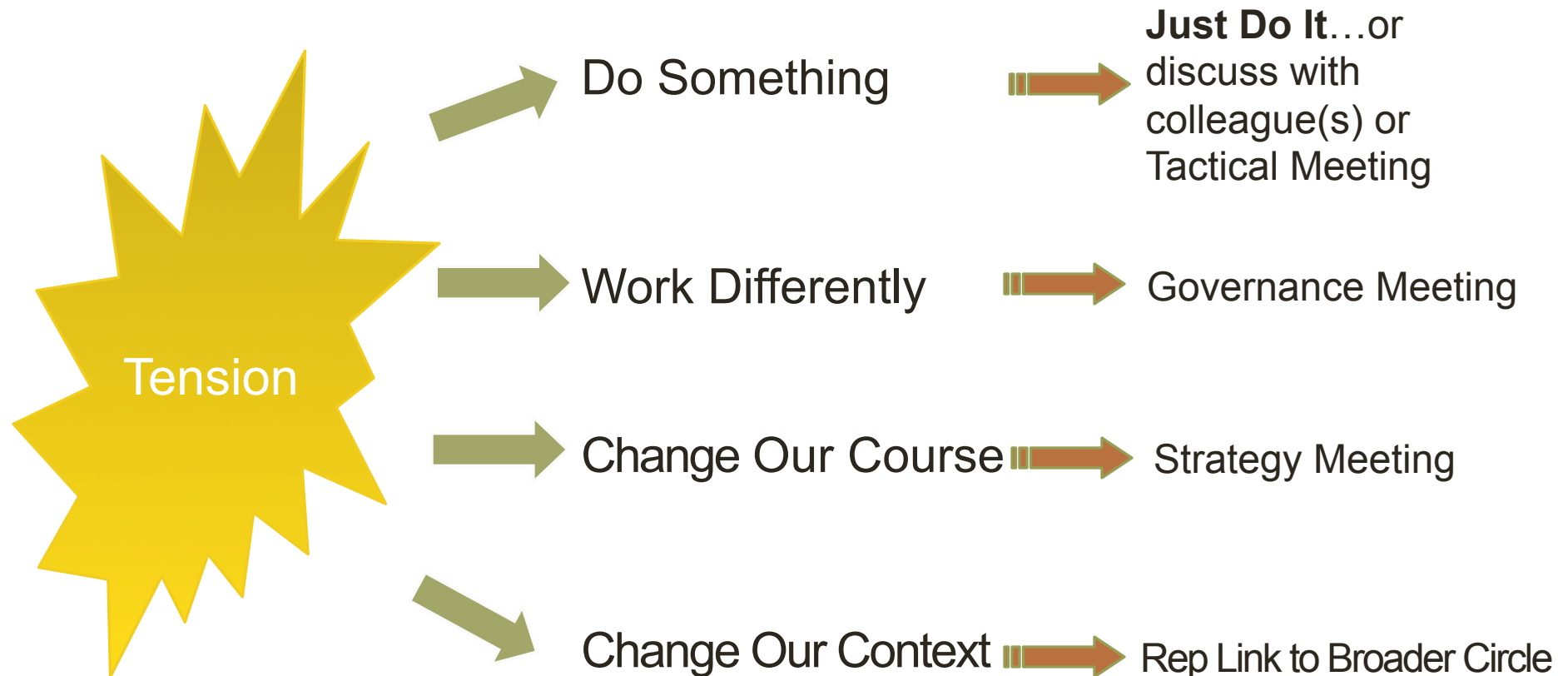**Purpose:** Intentionally Innovating To Serve The Greater Good

Circles

Bootcamp Education

Purpose: Exquisite Livelihood for Everyone

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4 Ways to Process Any Tension

Tension

Do Something → **Just Do It**…or discuss with colleague(s) or Tactical Meeting

Work Differently → Governance Meeting

Change Our Course → Strategy Meeting

Change Our Context → Rep Link to Broader Circle

In Summary: From Aim to Action

- Aim / Purpose
  - ↳ Given by Broader Circle

- Strategic Direction
  - ↳ Adjusted in Strategy Meetings

- Roles, Accountabilities, Authorities, Policies
  - ↳ Structured in Governance Meetings

- Projects
  - ↳ Managed in Tactical Meetings

- Actions
  - ↳ Dynamically Surfaced & Executed

"How do I become a butterfly? she asked. You must want to fly so much, that you are willing to give up being a caterpillar."

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About WonderWorks

Supporting You in Creating Conscious Organizations:

- o   Holacracy Implementation Services

- o   Holacracy Intro Days and Taster Days

- o   Conscious Leadership Workshops

- o   Executive Coaching Services

- o   Speaking Engagements

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