include

Inclusive Leadership
in the Digital Age

Handbook

for leaders and everyone who wants to become one

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include

Inclusive Leadership in the Digital Age

Handbook for Leaders and Everyone who Wants to Become One

You can‘t solve problems by using the
same kind of thinking you used
when you created them.
Albert Einstein

Authors

The 'INCLUDE – Inclusive Leadership in the Digital Age. Handbook for Leaders and Everyone who Wants to Become One' was created by emcra - Co-shaping Europe, Berlin (Michael Kraack, Heike Kraack-Tichy) and the Adam-Mickiewicz University, Poznań (Zofia Jakubczyńska, Adam Szymaniak, Tomasz Brańka), together with all the INCLUDE project partners. It is a partial outcome of the INCLUDE project that was financed with the support of the European Commission.

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The EU project INCLUDE

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Keywords such as self-organisation, autonomy, flat hierarchies and shared responsibility are becoming more and more common in our new working world. Our project INCLUDE supports people and teams in implementing a new, practical, and innovative leadership approach in the digital age that will help them successfully shape the future of their organisations together. To this end, INCLUDE offers a step-by-step guide with interactive learning and teaching materials.

emcra
Co-shaping Europe

Berlin-based emcra - Co-shaping Europe is a leading training and consulting company in the areas of management and organisational development as well as national and European funding and fundraising.

emcra accompanies foundations, associations and (social) enterprises through the challenges of change management. The focus is on financing/funding, digital transformation, new inclusive leadership approaches, project management and risk management, and the implementation of international standards.

lvh apa
Wirtschaftsverband Handwerk und Dienstleister
Confartigianato Imprese

lvh is an active interest group of craftspeople in South Tyrol. The main activity of lvh is the representation of the interests of crafts towards local and regional institutions, other associations, and the society. In addition, the lvh offers a wide range of services to its members, such as accounting, personnel accounting, tax computation, consulting on the fields of innovation, legal advice and different training courses, mandatory courses but also non-mandatory courses. We have approx. 140 employees and approx. 8.000 members.

The Cyprus Project Management Society (CPMS) was established in February of 2008 by a group of professionals equipped with the passion, knowledge, and competences to promote the Society's vision.

The Society is a non-profit professional association, which draws strength and competences from the voluntary participation and contribution of its members. It promotes the benefits of utilising project and other management methodologies and standards to companies, professionals, and the society.

and the project partners

CCI Vratsa is a non-governmental organisation that serves SMEs in Northwest Bulgaria. Since our establishment in 1991, we have been working towards the achievement of the most favourable economic environment for the Bulgarian business and facilitation of its activity. We work in close cooperation with local authorities, other NGOs, and business support structures from abroad. CCI Vratsa is a host structure of Europe Direct Center and we have three regional offices in Northwestern Bulgaria. The structure of CCI Vratsa comprises more than 1.000 companies – both private and state owned.

The IBWF e.V. (Institute for business consulting, business development and research e.V.) is the network for medium-sized business consultants. As the only network, it unites with its members all advisory disciplines. The own certification of its members underlines the high quality standards in solution-oriented advice.

Participation in forward-looking EU projects for user-friendly solutions, paired with a cooperative understanding of advice from its members creates practical, user-friendly solutions for SMEs.

The EU-Fundraising Association e. V. (EUFA) is a non-profit organisation active throughout Europe, with its headquarters in Berlin. EUFA was founded in 2010 by a network of professional EU fundraisers.

One of the main concerns of the EUFA is European integration and the support of European citizenship. Through its work, the EUFA aims to encourage individuals and organisations to think and work in a European context. As a professional organisation, the EUFA aims to establish quality standards for EU fundraisers, grant managers, and project managers from the profit and non-profit sectors.

Adam Mickiewicz University, Poznań, is the major academic institution in Poznań and one of the top Polish universities. Its 100-year old reputation is founded on a long tradition of higher education in the City of Poznań and the outstanding current achievements of its staff, students, and graduates. AMU as a research university employs 4,000 academics and has more than 35,000 students who can choose from among 366 fields of study offered by 21 faculties.

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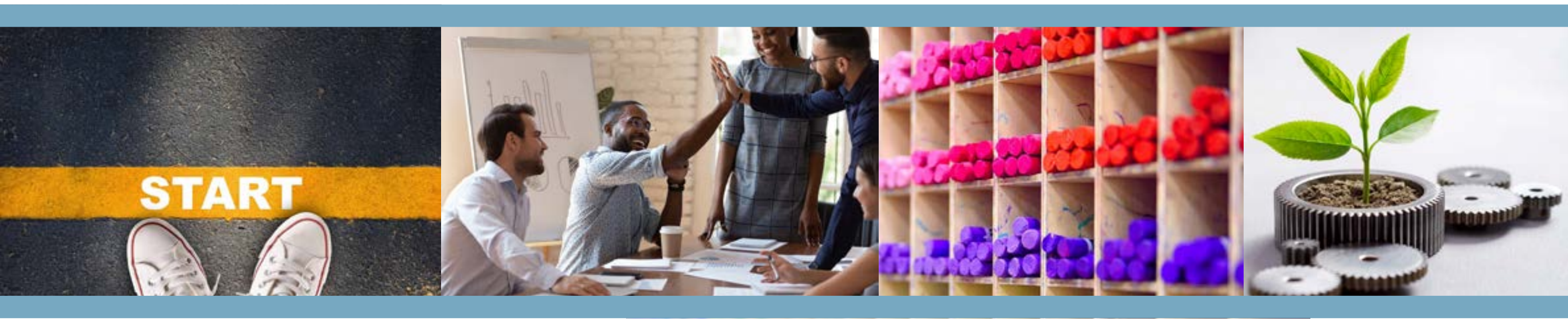

START

01

How Should I Use this Handbook?

Leadership in the digital age

Why are you reading this handbook? Are you curious to find out how you can effectively shape the future of your organisation in the digital age? Or are you faced for the first time with a leadership task and want to prepare yourself well for your new role? Perhaps you have realised that the methods used up till now are no longer producing the expected results and are looking for new avenues for you personally, for your team, or for your entire organisation? Or do you want to establish a start-up and would like to ensure that you can rise to tomorrow's challenges in your new company from the start? Maybe you are a trainer who would like to pass on the topic of inclusive leadership to others, or perhaps you already have some experience in this area and need inspiration how to convey this topic even better, given the conditions in our digital world.

Any one of these motivations is a very good foundation for successfully implementing the INCLUDE approach in the future. All the tools and methods introduced in this handbook have been described in such a way that they can be understood in private study and immediately implemented into your daily work. They are suitable for people with different styles of learning. When creating this handbook, the guiding principle was to support users in such a way that they receive quick support in day-to-day work situations and can work practically with the INCLUDE tools as soon as possible.

Are you interested in the theoretical foundations of INCLUDE?

The INCLUDE handbook has been written for practical implementation. For readers who are interested in the theoretical and methodological foundations of the INCLUDE leadership approach, we recommend reading **'INCLUDE - Inclusive Leadership in the Digital Age. Foundations for Leaders and Everyone who Wants to Become One'**. This text also arose within the framework of the INCLUDE project.

back

We know that there are no easy and universal solutions, and that every situation and every organisation is different. We therefore encourage all readers to go through the tools introduced here and choose the ones that will currently support them best on their journey to success. In addition to this, we specifically encourage you to adapt, change, or develop the tools to do justice to your individual requirements.

You can use the INCLUDE handbook in different ways, depending on your specific needs. You will find important pointers below on how to use this workbook in three key roles: as an INCLUDE leader, as someone with responsibility in an INCLUDE process of organisational development, and as an INCLUDE trainer.

How should I use this handbook to become an INCLUDE trainer?

Lots of handbooks for leaders describe why inclusive leadership is important and what should fundamentally be done. They do not offer enough specific instructions, however. Support for practical implementation is far too often missing.[1] This handbook places these tools in your hand. In this way, you can progress towards becoming an inclusive leader in the digital age, one step at a time. You can also lay the foundations for the development of your organisation into an inclusive organisation.

You should therefore use this handbook if you are looking for ad-hoc tools for dealing with current challenges. You can also go one step further, however, by planning and implementing not only your personal change, but also the change of your entire organisation. By doing this, you will create a working atmosphere that is inclusive for both your employees and for you as a leader.

The INCLUDE handbook is not a textbook that you need to read from cover to cover. Depending on your goals you can decide which chapters you would like to look at in more depth. It is also not a book to be read in one evening. The INCLUDE handbook has been designed in such a way that it can become a permanent companion to your personal process of development.

We would encourage you to make a thorough study of the contents, to use some of the instruments and questions for further thought, to implement exciting tools as soon as possible in your day-to-day work, and to first assess all information thoroughly from your individual perspective before putting it to use.

When choosing which tools are most suitable for you, you can orient yourself around the five most important areas of development for inclusive leadership in the digital age. You can find a detailed introduction to these areas of development in chapter 3.

[1] The results of the EU project 'Inclusive Leadership' were an important foundation for the development of the INCLUDE handbook. We recommend that you also make use of these materials, which are available free of charge. INCLUDE builds on these results and expands them so that they can be provided to a broader target group. You can find the results of 'Inclusive Leadership' here: https://inclusiveleadership.eu/de/

The areas are:

Leader – Tools for self-reflection and self-awareness
This part of the handbook contains tools for you to progress towards becoming an inclusive leader by, amongst other things, working on your mindset and convictions.

People – Tools for developing relationships
This area of development is aimed at readers who would like to lead their teams better by, for example, creating healthy relationships with their co-workers and a good working environment.

Structure – Tools for me, my team, and my organisation
In this part you will find tools for developing the structures of your organisation in such a way that you and your team will be able to respond rightly to the challenges of today and tomorrow.

Process – Tools for living out a shared vision and effecting change
The focus in this section is on practically implementing changes that will lead to the realisation of a shared vision

Technology – Tools for dealing with digital developments that are changing our world
In this chapter we describe how you can deal with the opportunities and risks that the digital age holds in store.

One easy way to look for suitable solutions and tools is to have a glance at the detailed description of the five areas of development. You can find information in chapter 3 about the contents of the areas of development. Chapter 5 brings these five areas of development together with the INCLUDE tools. Depending on which area of development you, your team, or your organisation would like to work, you can use an overview to identify the corresponding tools.

If you would like to implement the INCLUDE approach in its entirety – not just for you personally but also for your organisation – then you can find some important tips in the next paragraphs on how to apply this handbook.

How should I use this handbook to accompany an INCLUDE process of organisational development?

If you would like to implement the INCLUDE approach in your organisation, begin by reading chapter 4 of this handbook: 'The INCLUDE model – step-by-step instructions'. You will find answers to the following questions there:

- What is the INCLUDE process model?
- What are the individual steps of the INCLUDE process model?
- Why were the steps of the model ordered in this way?
- How can you implement the INCLUDE process model in your organisation?

- Why is your personal development the first step, and how can you carry out your own process of development effectively before turning your attention to the development of your organisation?
- How can you accompany and moderate an INCLUDE process of organisational development?
- Which tool should be implemented in which phase of the INCLUDE process model?

'Beta-Codex', 'Open Space for Leaders', and 'Open Space for Organisations' are tools that you will certainly need. These are described in chapter 6. Foundational principles for your process of change are summarised in 'Beta-Codex'. This will provide orientation for all those involved in your organisation. Open Space for Leaders is all about an innovative application of the Open Space concept for individuals or for small leadership teams. 'Open Space for Organisations' is a format that has been used around the world with great success for many years. It is used by organisations or large groups. At the end of chapter 4 we have put together a possible schedule for you to orient yourself around if you would like to know which tool should be used in which phase of the INCLUDE process model.

Despite these recommendations, the recommended model is flexible and will give you the freedom to choose the tools that are useful for your transformation. In chapter 5 there is a table that provides an overview of the tools. This table will make it possible for you to also choose the right tools for your organisation at each developmental stage.

How should I use this handbook as an INCLUDE trainer?

If you are, or would like to become, a trainer for inclusive leadership, then you can use the INCLUDE tools in the following way:

1. You can develop as a leader if you would like to work as an internal trainer or for external organisations in the future.
2. You can use our INCLUDE model workshop programmes to develop and offer new training courses to people who want to become INCLUDE leaders.
3. You can use the INCLUDE information as inspiration for developing the training courses that you currently offer on the topic of inclusive leadership. This is particularly applicable if you would like to lend more weight to technological developments in the digital age.

In the first use case, you should work with this handbook in the way that is recommended in the section above: 'How should I use this handbook to become an inclusive leader?'.

In the second use case, you can use our model workshop programmes and the INCLUDE handout 'INCLUDE – Inclusive Leadership in the Digital Age. Content for Training Courses and Workshops'. In chapter 8 you will find a model workshop programme for a one-day and two-day INCLUDE workshop respectively that you can carry out online or offline. Both INCLUDE model workshop programmes have been tested across Europe. They convey foundational knowledge on the topic of inclusive leadership, as well as on the INCLUDE tools in the five INCLUDE areas of development: leader, people, structure, process, and technology.

Materials for INCLUDE trainers

In addition to this, as part of the INCLUDE project a much more comprehensive curriculum was developed that accounts for the guidelines of the European Qualifications Framework for Lifelong Learning (EQF): **'INCLUDE – Inclusive Leadership in the Digital Age. Content for Training Courses and Workshops'**. This **INCLUDE EQF Curriculum** gives you the opportunity to integrate the INCLUDE content in the educational courses you offer, for example as a provider of further education or as part of a professional training course.

Depending on your personal experience, you can implement the INCLUDE model workshop programmes directly or use it as inspiration for creating your own tailored curriculum. You can use the instructions in chapter 8 ('How to prepare and conduct an INCLUDE training cours?') on how to adjust an INCLUDE training course to the needs of your organisation, your training group, and to your own personal experience. In addition to this, we have put together further pointers for you in this chapter so that you can implement the handbook in the best way possible as an INCLUDE trainer.

For the third use case, it is also easy to identify the right information and tools. One key is the practical use of the tool that is outlined at the start of each tool description in chapter 6. In this way, you can choose the appropriate INCLUDE tools for the challenges facing your participants.

In addition to this, the table in chapter 5 will enable you to choose the tools with reference to the five central INCLUDE areas of development: leader, people, structure, process, and technology.

How can you use the INCLUDE tools?

To make it easier for you to work with the INCLUDE tools, each tool is portrayed in the same way in chapter 6. You will find the following information for every tool:

1. Under **benefits** you will find suggestions about the results that you can expect after implementing or using the tool.
2. The anecdotes or examples entitled **real-life examples** will enable you locate the tool in the day-to-day operations of your organisation. You will more easily understand in which situations it is worth applying the solution that has been introduced. The examples and anecdotes describe both good and bad practices.
3. The in a **nutshell** section provides a short description and will help you to quickly get to know the tool. This description is complemented, wherever possible, with a visual depiction of the tool's primary content.
4. The **instructions** describe in detail how the tool can be implemented in everyday situations at work. You will discover in which context the tool should be used, including, for example, whether it is suitable for your personal development or for improving how you structure your

team's collaborative work.

5. Under **day to day support**, you will find useful information on how to practically apply the tools. You will be alerted to potential mistakes and traps that can be made when using the tool, or that you could find yourself walking right into. You will also receive further suggestions for how to implement the tool in your everyday work.
6. The **resources** provided make it possible for you to dive deeper into the tools and content that have been introduced. There you will find pointers to the authors of the tools that have been described, as well as useful literature and weblinks.
7. The **hashtag** area refers you to primary key words that characterise the tool. You could use these key words, for example, to search for further materials online.

The tools in chapter 6 are all described from the leader's perspective. If you would like to use the tools as a trainer, you can find pointers about utilising the tools in a training context in chapter 8: 'How to prepare and conduct an INCLUDE training course'.

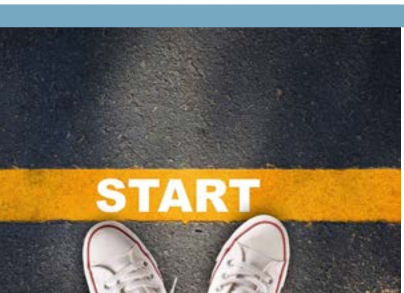
What Should You Now do First?

You now need to decide which of the three possible uses is most interesting to you: an INCLUDE leader, an individual with responsibility in an INCLUDE process of organisational development, or an INCLUDE trainer. The most important thing is that you start now and strike out on your journey towards becoming an inclusive leader in a digital age. Have a closer look at the content in the INCLUDE handbook that interests you. Make notes, scribble down your ideas, brainstorm, change and expand the tools, ask questions. But more than anything else, put them into practice and experiment, because change will only occur if you do things differently than you did before.

We are convinced that our tools will inspire you to implement inclusive leadership as an answer to the challenges of the digital age, and that they will give you valuable insights, as well as helping you to make good decisions and to develop strategies that work. Best of all, however, you will develop your own completely individual style of inclusive leadership.

Email course for your INCLUDE start

Despite its importance, a topic like inclusive leadership in the digital age can quickly fall into disuse in your daily business. In our daily work and leadership, we must often focus our attention on urgent tasks and the important work on our personal development or on the structures of our organisation is in constant danger of being pushed to one side. No organisation can afford the negative consequences of this procrastination, however. We have therefore developed an **INCLUDE email course** for you for the initial phase of your journey towards becoming an inclusive leader. Over the course of 12 weeks, you will receive a short, practical impetus to get you into the topic each week. We will be supporting you each week with a brief insight into the world of inclusive leadership that will put you in a position to implement our tools immediately in your working environment. Sign up right away to make sure that your good intentions turn into actions. You can sign up here http://link.emcra.eu/INCLUDE_EmailCourse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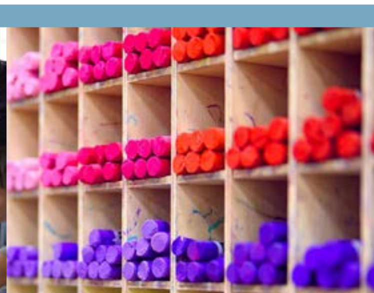



02

Who Should Use the Handbook?

… if you‘re feeling brave

The INCLUDE handbook has been written for anyone who has leadership responsibility, or who would like to assume more responsibility in the future. There is a particular focus on you being able to overcome and make better use of the challenges and opportunities that arise out of our digital age for you personally and for your organisation.

The handbook contains important information for anyone who wants to develop themselves and their organisation. In particular, the following five areas of development, which are relevant for all leaders, are dealt with in detail:

- Self-reflection and self-awareness as a prerequisite for becoming an INCLUDE leader;
- Development and maintenance of relationships within an organisation, especially to master leadership tasks in teams;
- Developing or re-organising the foundational structures in your organisation, so that the potential of all leaders, employees, and teams can find fuller expression;
- Developing or re-organising the working processes, so that changes in your way of work become effective more quickly, and so that everyone in the organisation is acting in concert as you implement your vision;
- A more proactive interaction with new technologies and digital developments to equip the organisation for the future.

Everyone who is open to the contents of this INCLUDE handbook will have something important in common: the willingness to develop themselves personally and to want to actively shape changes in organisations so that they will be able to face the challenges of today and tomorrow better. The INCLUDE handbook is written for people who have the courage to experiment, to say goodbye to old convictions, to bring an end to something that is not working (any longer), and to learn from scratch what could work better. For those who are ready to put aside the role of the all-knowing expert and to admit that they don’t know everything and that they can’t do everything. For leaders that have recognised, or at least felt, for a long time that something must change, only they weren’t able to put exactly into words what this is. For the INCLUDE approach you need openness, curiosity, and the courage to go in new directions, even when you are not entirely sure at the start where this path will lead you. For ‘new paths are created by our walking on them’ (Franz Kafka).

Four groups of people for whom INCLUDE is particularly suitable

We had four groups of people in mind when we wrote the INCLUDE handbook - groups that we feel particularly strongly about. These are current and potential leaders from small and medium-sized enterprises (SME), from small and medium-sized organisations (SMO), from start-ups, and in training providers involved in professional education.

The INCLUDE approach has been designed to be particularly applicable to these four specified groups of people. This does not mean, however, that it cannot be successfully implemented by others who are interested, regardless of whether they come from small or large structures, and whether they use it in part or as a whole.

Small and medium-sized enterprises (SME) form the basis of the European Union’s economy. 99.8% of all enterprises outside of the financial sector are SME, and they employ roughly 2/3 of all employees.[1] The vast majority of consulting and training concepts have, however, been designed for large enterprises since these are the ones who

[1] Cf. European Commission (2018). Annual report on Europe SMEs 2017/2018. SMEs growing beyond borders.

have the budget to pay external consultants and trainers. For most SME and microenterprises, by contrast, their finances are usually tight and the pressing challenges of their day-to-day business occupies centre stage. This has the result that in SME, even leaders work more ‘in’ the enterprise than ‘on’ the enterprise. In other words, they take too little time for the development of structures and processes, as well as for the comprehensive analysis of new and fundamental changes, such as digital transformation.

SMO are **small and medium-sized organisations**, for example foundations, societies, associations, co-operative structures, or scientific institutions. These non-governmental organisations have in common that they are not (or at least not primarily) active on the market, in other words, making a profit is not one focus or the primary focus of their work. Like SME, SMO are therefore often not able to buy external support at significant expense. They form, however, a large part of the so-called third sector, which employs roughly 28.3 million people across the EU.[2] That is more employees that the construction sector, for example. Even more than many SME, SMO are affected by a lack of resources in terms of time and money for a substantial discussion of the necessary structural developmental measures. Alongside their focus on their daily work, they must apply for funding to finance their work. This is largely from state funding and/or resources from private sponsors. Fundraising and the development of funding projects are activities that tie up important resources. Without these activities, however, they cannot work successfully. In addition to this, leaders in many SMO face the challenge of having to integrate and lead unpaid volunteers alongside their full-time employed staff.

Young enterprises or organisations, meaning **start-ups** both in the economy and in the third sector, are very important in the digital age. They develop new products or services

[2] Cf. Third Sector Impact-Project (2018): The third sector. A renewable resource for Europe. Summary of main findings of the Third Sector Impact project.

and are creating a large part of tomorrow's employment. Start-up does not always mean start-up, however. There is an important group of new launches that are primarily financed by external capital, for example from venture capitalists. The focus of these new launches is often on quick growth in a one-dimensional way. It would be possible, however, to create better structural conditions from the start, even when it comes to management and leadership. This would lead to an even more successful net value added for these start-ups which, when successful, sometimes develop into significant national or international players. This would be possible by paying consistent attention to the INCLUDE ideas from the very start. By far the largest start-up group are enterprises and organisations that are built up by a founder or by a small founding team either without or with only very limited external resources. SME often take the plunge into economic independence with publicly subsidised credit for their founding. Non-profit organisations are commonly left out in the cold and must build the organisation one step at a time through unpaid personal contributions. A large part of the SME and SMO that go on to be successful began in this way. The third group, which are not really start-ups in the traditional use of the word, consists in enterprises and organisations that are due a generational change in the leadership. This could be, for example, where a skilled craftsman in a workshop hands over the leadership to a new owner due to his or her old age. In this situation there are numerous opportunities for the new people in charge to make use of the INCLUDE approach.

Training providers in the professional training sector are usually working as an SME in the vocational training and education sector. But there are also societies, associations, etc., i.e., SMO from the third sector, that are active in the educational sector. To this extent, the information already outlined above for SME and SMO also applies to these providers. Training providers can be important multipliers for the INCLUDE approach if they go along with the INCLUDE process for organisational development within their own company. They are even more important as providers of INCLUDE training courses if they spread the content of INCLUDE by communicating it to their specific target groups.

Materials for INCLUDE trainers

In chapter 8 you will find a one-day and two-day INCLUDE model workshop programme that follows the INCLUDE approach. Both workshops can either be carried out online or in person. A more comprehensive **INCLUDE EQF Curriculum** that accounts for the guidelines of the

European Qualifications Framework for Lifelong Learning (EQF) is also available to all training providers: 'INCLUDE – Inclusive Leadership in the Digital Age. Content for Training Courses and Workshops'.

That sound good, but ...

Even you are convinced in principle about an approach like INCLUDE, you may and should have doubts about whether this method is now the right one for you personally or for your organisation.

We often heard questions like the ones below when we were developing and testing the INCLUDE approach:

- 'Is it even possible to reshape my organisation without the support of expensive consulting companies?'
- 'I know that I have to do something, but I have no idea how I should proceed!'
- 'I just have too much going on and no time to learn and implement academic tools.'
- 'I am too busy with my daily responsibilities to let myself spend time on inclusive leadership.'
- 'It all sounds good in theory, but isn't it really something for large organisations that have people to work on this?'

These are all legitimate objections. In addition to this, the general scepticism about new methods of management and leadership, especially in smaller organisations, does not come from nowhere. The consulting and training industry is geared towards always developing new methods. That is often nothing more than old wine in new wineskins. But when it has a fashionable title and a correspondingly high price tag, many leaders and managers – especially in large enterprises – are all too happy to take them up on it. People are modern and go with the times. These fashionable approaches are seized even more eagerly because they promise seemingly easy solutions and quick gains without having to dig down deep into an organisation's deep-rooted process.

Scepticism is always called for when new management and leadership trends advertise themselves as having found the philosopher's stone. This is also true for 'inclusive leadership'. This is a term that has also become fashionable in recent years. A healthy scepticism about this term and even about our INCLUDE approach is good – better than blindly following anyone who starts talking about inclusive leadership.

To say it plainly: even some of the tools that we will recommend you in this handbook have been brashly marketed by their authors. You get the impression, for example, that organisations or enterprises must simply draw a 'canvas' for all their challenges and they will immediately progress with success to the future. And simply being able to conceive of an organisation as a peach rather than in terms of the traditional top-down pyramid structure is not going to be enough to give birth to change. It is true that many good tools and concepts are being marketed, for example through books. As you read them you will notice, however, that despite the valuable information they convey, there is something missing: an answer to the question 'How can I put that into practice in my organisation?'.

As you work through the INCLUDE handbook you will get to know both tools that have just been briefly mentioned as examples, and we are absolutely convinced of their value. Every organisation, team, and situation is different, however. This is a truism. It is therefore not good, however, simply to squeeze your organisation or enterprise into the pre-built mould of just one specific tool and to expect it to result in fundamental change. What makes the difference is the right choice, the appropriate combination, the skilful adaptation of tools to your specific needs. With the INCLUDE approach we are placing a structured procedure in your hand. Like a banister on a flight of stairs, this will give you a framework for your personal decisions and for those of your team. You are free to make your own decisions, and as a leader in the digital age you must have the courage to decide what is right for you and your organisation.

The aim of the INCLUDE handbook is to offer you working solutions for this decision-making process that have been tried and tested, and that you can implement as a leader in your day-to-day work as quickly as possible. We recommend that you proceed one step at a time and at your own pace. The most important thing to remember is that you and your team are always in the role of the metronome. One foundational principle of the INCLUDE approach underlines this aspiration: 'It's safe enough to try' and 'Good enough for now'. This originates from 'Sociocracy', an organisational concept that places a firm emphasis on self-organisation. To put it another way, a new approach, process, or method that you are introducing into your organisation can be tested and implemented for as long as we are not putting the organisation in danger. In the testing phase you will determine whether it worked as planned or not. You can find out more about this step-by-step approach in chapter 4.

Summing it up: when should I use INCLUDE?

The tools introduced here can be implemented successfully by anyone who:

- leads their own organisation, as a result of which they undertake both management and leadership tasks;
- carries responsibility for a team of employees or for a department;
- leads projects;
- is an 'informal' leader, for example they enjoy the respect of their colleagues because of their experience;
- is an employee in an exposed position. In other words, they could, for example, influence the direction of the organisation's change through their strong connections;
- has the task of being a 'Change Agent' in their organisation, to bring about constructive decisions in processes of change and innovation;
- wants to shoulder more responsibility in the organisation, regardless of the position they currently fill, and is convinced that something needs to change.

The handbook is also aimed at leaders who want to change and develop themselves and their organisation. In practical terms, that means:

- Reshaping an organisation from the ground up so that it is prepared for the challenges of today and tomorrow;
- shaping an organisation one step at a time, in other words promoting gradual changes by using internal resources;
- carrying out smaller changes, in other words implementing solutions that are tailored to the specific challenges of being a leader;
- introducing changes on the operational level by implementing pragmatic instruments to solve daily challenges.

Trainers that would like to share inclusive leadership in the digital age with others, whether now or in the future, are a further important target group of INCLUDE. These can use the tools introduced here both in the roles described above, as agents of organisational change in their own organisations, and when designing external workshops and moderating or accompanying processes of organisational development.

Chapter 8, 'How to prepare and conduct an INCLUDE training course', explains in detail how trainers and coaches can use the INCLUDE approach and this handbook. The following applications are a particular possibility here:

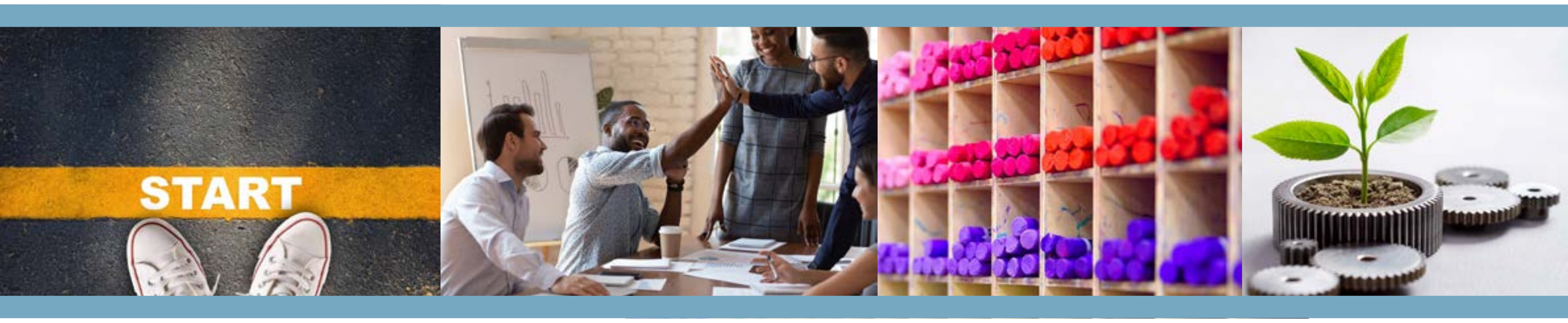
- as a basic inspiration for designing training and facilitation processes;
- implementing the ready-to-use INCLUDE model workshop programmes for both online and in-person courses;
- using individual tools that can be integrated into existing training concepts.

Who is the INCLUDE handbook not suitable for?

The INCLUDE handbook can also be usefully studied by leaders who work in hierarchical top-down structures or who prefer this traditional type of organisation as a stimulus for changing or developing their thinking.

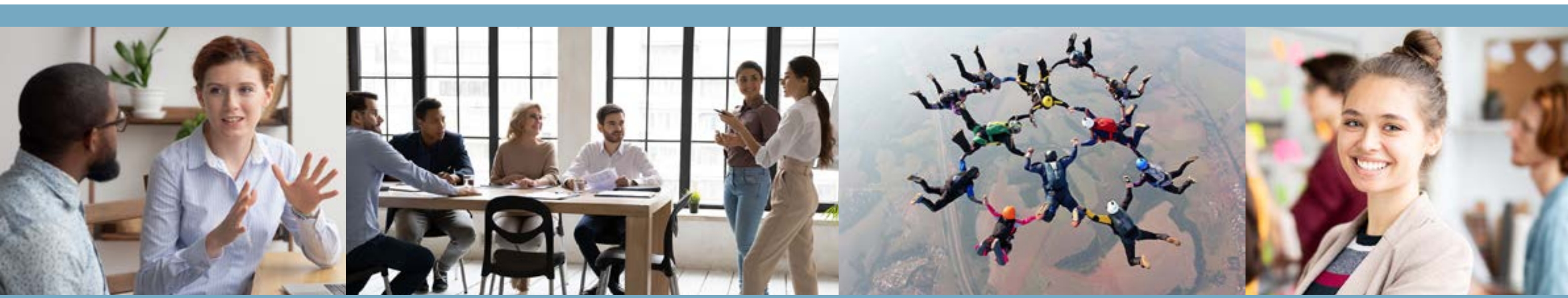
The handbook is not designed, however, to convince sceptics that they should implement the INCLUDE approach. Our primary aim is to reach and support those who are ready to move ahead with the help of the INCLUDE approach. A short note at this point to all those who are sceptical: it works, and there are many examples across the globe showing that it works. You can only experience it in practice, however, so you have (to want) to implement it.

It is absolutely true that considerable success has been achieved in traditional organisations and enterprises led from the top-down – and many good services have been performed for society. We are not disputing that, but simply saying loud and clear: it could be more efficient, more oriented around customers, more cost-effective, etc. This applies to every organisation, regardless of whether they are active in the market or as a foundation, an association, or a social economy organisation serving public welfare.


START

03

Five Areas of Development for Leaders in the Digital Age



From challenges to areas of development

In this chapter we will introduce you to the INCLUDE approach and the conceptual framework of this handbook. The starting point is the conditions that determine leadership in the digital age. You will get to know the central challenges that leaders and their organisations must find answers to in today's world.

On this basis, the terms 'leadership' and 'management' will be distinguished from each other. This classification is important for the division of the INCLUDE approach into the five areas of development: 'leader', 'people', 'structure', 'process', and 'technology'. Each of these areas of development deserves the undivided attention of INCLUDE leaders and everyone who wants to become one.

If you wanted to summarise this chapter's main point in a single sentence, then it would be this: inclusive leadership in the digital age is both – work with and on people, and work with and on organisations.

Leaders in the digital age – a first approach

As you're currently reading through this handbook, you could order food to your home at the same time and pay for it with just a few quick clicks on your smartphone. By the time you've finished reading this chapter, the delivery driver might already be standing on your doorstep. Even just ten years ago, this way of doing things was far from self-evident and could not be done as quickly as it can today.

Technological developments have sped up our world and have an impact on our lifestyles – how we live, consume, make and maintain friendships and relationships, work, or spend our free time. Technological developments and changing sociocultural attitudes affect every organisation's work. What is the result of this? External changes demand internal changes. This is true for your entire organisation, especially for its processes, structures, and social relationships, in other words for the way that your work together is organised.

It also means that you should think about changing your style of leadership and may perhaps need to look for a new conception of yourself as a leader.

What offers great opportunities also presents enormous challenges at the same time for anyone who currently carries responsibility or wants to do so in the future. The development of digital tools makes it possible to work from a distance and form virtual teams. Experience over the past few years, however, has led to the realisation that this does not automatically lead to better work together in teams. If you lead teams that are perhaps primarily made up of digital nomads, then this challenge will sound familiar to you.

Digital nomads are people that don‘t feel connected to one place and work from anywhere in the world. This unboundedness can lead to a faster change of workplace. One of the greatest challenges when working with remote or hybrid teams is therefore creating a feeling of connection and belonging to a team or an organisation. Leaders have never had to pay as much attention to this topic as they do now. The topic of solidarity has, admittedly, always been important, but many connections arise naturally when solving tasks together and exchanging knowledge in the office, or when taking a coffee or lunch break together.

A leader’s sphere of work was more manageable and predictable before the digital age. Today, leaders and organisations must act and make decisions in an environment that has tended to become less clear and more uncertain. This is not to say that life as a leader used to always be easier. Every period has its challenges, and it does not mean that leaders and employees didn’t use to have to make difficult decisions, simply because today’s technical possibilities didn’t exist in the past. The INCLUDE approach takes technological change as an opportunity to ask, however, whether it is high time to question the decision-making methods, structures, and processes that most leaders continue to take for granted. In recent years, you can increasingly find new concepts in both theoretical literature and in the working and consulting worlds that are now even being noticed and questioned by conservative organisations led from the top down. Why? Because what was perceived as the standard approach several years ago is no longer working.

One important skill of today’s leaders is therefore the ability to question traditional methods and approaches, and to learn new concepts for working together and providing services within organisations – regardless of whether these are economically active in the market or identify as part of the third sector. This INCLUDE handbook, with its 27 tools, offers leaders and everyone else who is interested in these new concepts and approaches a substantial foundation for growth by covering all the pertinent challenges facing leaders in the digital age.

In our age, leadership means particularly paying attention to the most important overarching processes of change in Europe and the world. One example of this: until recently, ‘democracy’ was a concept that people usually only discussed after heading home from work. Even those who lived in democratic systems usually accepted without complaint that their workplace was dictated by hierarchically determined rules from ‘those at the top’. For creative minds, this kind of workplace is a horror. Since pluralistic societies generally offer enough ways for people to develop outside of hierarchical structures, this was not a significant problem in the past. The number of people who, amongst other things, no longer want to stick to the dress code and spend their workday dressed in a suit is growing. More people than ever want to bring their individuality into their workplace. They want to be involved in decision-making processes and complete tasks that are more creative than reproductive. These people expect their work to be a positive, enriching experience and not simply a way of making money.

To clarify: the number of those who view work as a necessary evil to cover their living costs is still high and will remain high. The

INCLUDE approach offers an option to everyone – including small or medium-sized organisations and SME – who believes that they can no (longer) afford to go without the creative minds that have higher expectations of their workplace. Well-educated young and old employees in Europe have an extensive choice of job opportunities in their own countries and abroad. It is therefore no surprise that leaders are increasingly frequently agreeing to the wish for a 4-day week, becoming interested in the topic of inclusive leadership, democratising processes of work, and replacing top-down management with bottom-up approaches. Amongst other reasons, they are doing this because they desperately need innovation and therefore must become more attractive to creative minds. To put it another way: you cannot insist on dominion and submission and expect this to produce a steady stream of innovation and creativity (Liv Larsson).

The good news is that more democratic or inclusive, self-organised organisations are not wishful thinking. Anyone thinking of endless discussions, consensual decisions reduced to the lowest common denominator, hindrances to progress, power plays etc. is in good company. The vast majority of leaders and even their employees think like this. Except this is wrong. You don't have to resign yourself in your organisation to the negative side effects of traditional democratic decision-making processes as you know them from politics. There are alternatives that actually work. Go and have a look for them. With its 27 tools, the INCLUDE handbook offers you a shortcut and a fascinating treasure trove. You simply have to make the most of your opportunity.

Working with the INCLUDE approach does not mean that you end up needing more time for your decision-making processes, for example. INCLUDE does shift the necessary expenditure of time to the beginning of the process, however, to when the decision is made. Organisations where directive decisions are made from the top down can do this quickly when necessary. They then have to spend more time later, however, convincing the employees who will implement these decisions or have to work with the results and 'selling' their decision. The fact that this work of convincing them often does not work is the reason why many processes of change in the past have failed. In practice, however, even hierarchical organisations usually only decide quickly when it must be this way.

The decision-making process in an organisation that acts inclusively can require a bit more time. The following implementation, however, will generally occur more smoothly as a result. If a decision is made collaboratively and all those affected by it are involved, you can expect less or even no resistance to its implementation. Instead, you can anticipate strong support because of people's identification with the decision. The additional time invested at the start usually pays off richly. If, in addition to this, you use the appropriate decision-making process that we introduce you to in chapter 6, you will find that even organisations that act inclusively can make quick decisions.

Challenges for leaders in the digital age

At the start of each of the 27 tools that we will introduce you to in chapter 6 you will find a box with the title 'Benefits – When is this method useful?'. Using the benefits for each tool formulated there you will be able to quickly work out whether the specific tool provides a suitable answer to the individual challenges in your organisation.

The central challenges for you in the digital age have been summarised into 11 topical areas in this chapter.[1] These areas build on each other and contain some overlap. You can read the following list from top to bottom from your organisation's perspective or from your personal perspective, starting from the bottom and going to the top. The following primary challenges will help you here to gain an initial sense of direction. They also provide the foundation for the five INCLUDE areas of development that you will become familiar with below. Individual challenges can generally be linked to several of the areas of development.

[1] Specific challenges from leaders' daily lives are linked to the eleven topical areas in the handbook 'INCLUDE – Inclusive Leadership in the Digital Age. Foundations for Leaders and Everyone who Wants to Become One'. You can also download this publication for free in English: http://link.emcra.eu/INCLUDE_manuals

Challenges: thematic areas

- Establishing and developing an organisation that is successful (in the market);
- Getting innovation underway and creating genuine added value for customers or target groups;
- Initiating, moderating, and leading processes of change;
- Creating the conditions for processes of change to take place more quickly and agilely;
- Understanding new technologies and using them to the organisation's advantage;
- Implementing decision-making processes that enable decisions in the entire organisation to be quick and, at the same time, more democratic;
- Sharing power and responsibility so that decisions can be made by those who are best suited to do so;
- Developing and leading teams that can attain their full potential;
- Developing relationships that are built on mutual respect and trust;
- Valuing and fostering diversity;
- Developing personally and continually learning.

What is leadership and what is management in the digital age?

Anyone wanting to develop into an INCLUDE leader and thereby face up to the challenges outlined above will embrace change. Leadership in the sense of INCLUDE aims at wanting and enabling new things together. Even more than this: INCLUDE leaders also want to do new things 'correctly'. This is completely different to an organisation's everyday life. But digital transformation is also not just any standard change. Just like the industrial revolution, it is a fundamental change of our living and working habits (cf. Brynjolfsson/McAfee 2016; Schwab/Davis 2018). It is therefore only logical for all leadership approaches and methodologies to adapt to the new digital age.

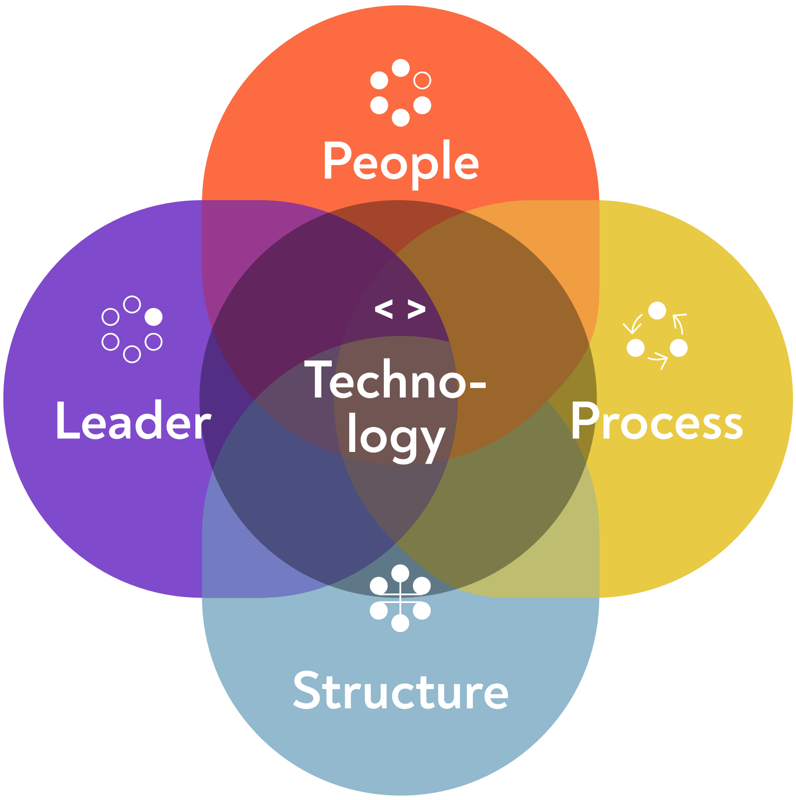
John P. Kotter's classic definition of leadership is a good starting for developing our understanding of leadership in the digital age: leadership generates change and movement in an organisation. It is all about setting a new course, for example, or having an inspirational effect on one's own sphere of influence (Kotter 1990: 4ff.). In the words of Peter Staudt, leadership is therefore 'the ability to give people with visions a new perspective and purpose so that they identify with certain goals and values' (Staudt 2017).

In contrast to this, the central feature of management is that it generates order and consistency in an organisation when, for example, controlling is used to assess results or trigger specific actions in daily business (Kotter 1990: 4ff.). The following definition also comes from Kotter: management is 'the ability to lead a group of people, to manage the processes involved, and to make optimal use of the required resources to meet a previously defined goal' (Staudt 2017).

It is neither sensible nor necessary to make a sharp distinction between these two terms. The INCLUDE approach is fluid when it comes to the demarcation between management and leadership. The one does not work without the other – INCLUDE views management and leadership as two sides of a coin. Management tasks are also all about leading teams, for example. It is unhelpful to act as if leaders do all the important pioneering things and managers 'simply' focus on daily business. It remains clear, however: INCLUDE leaders care about creating change and trying out new things. In doing so, they want to make decisions where possible together with all those involved. Their goal is to have an organisation that is shaped more by self-organisation than it used to be. For INCLUDE leaders, this means handing over responsibility and sharing power. You want this because you have realised that 'the same old' is not enough in the digital age due to the fundamental changes and the comprehensive challenges and diverse opportunities that go hand in hand with this (cf. more details in chapter 7).

Overview: the five areas of development for inclusive leadership in the digital age

INCLUDE distinguishes between five areas of development in which leaders can evolve to be effective in the digital age. These five areas of development are:



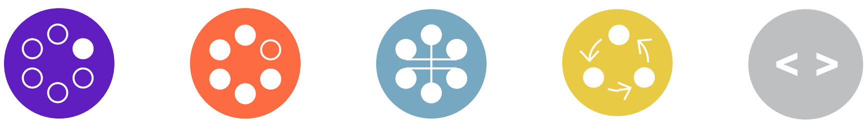
'leader'
self-reflection and self-awareness;

'people'
developing relationships;

'structure'
I, my team, and my organisation;

'process'
living a shared vision and creating change;

'technology'
dealing with the driving forces that change the world.



All five INCLUDE areas of development work together and complement each other. For example, increased self-organisation (see area of development 'process') is only possible if more trust is built up in each other (see area of development 'people') and the formal exercise of power (see area of development 'structure') is limited. In addition, INCLUDE leaders need a pronounced ability to assess opportunities or risks, as well as to assess the impact of technical innovations on their own organisation (see area of development 'technology'). They also need good self-awareness, especially with regard to their own abilities and limitations (see area of development 'leader'). That is why it is important to go through the entire INCLUDE process both as an individual and as an organisation. There are no shortcuts. INCLUDE leaders are characterised by the fact that they take all five areas of development seriously and continue to develop in all areas. You can find out more about this in chapter 4.

Leadership and organisational development – they only work together

Many leadership approaches are too short sighted. The focus is primarily on the question of how leaders can shape their relationships with their employees so that they achieve the results that they have specified for them. The leader is generally also thought of and addressed as a person who should develop. At their heart, however, these approaches 'only' focus on the INCLUDE areas of development 'leader' and 'people', although they commonly lack an inclusive orientation.[2]

Little to no attention is paid to questions of organisational structure or working processes within an organisation when leadership is being discussed (the INCLUDE areas of development 'structure' and 'process'). Anyone who has such a short-sighted view of leadership is only scratching on the surface. The 'new work' approach that has become increasingly popular over the past few years has been rightly criticised for precisely these reasons. Those sending themselves and their team to 'new work' seminars whilst keeping everything else that determines their shared work within the organisation the same as before is not really serious about inclusive leadership.

For a successful INCLUDE process of change, you must work on all areas of your organisation so that your organisational culture also develops in the direction of INCLUDE. Otherwise, you will be confronted with Peter Drucker's observation: 'Culture eats strategy for breakfast'.

Why is this? It's very simple: just as good software from a bad analogue process does not make a good digital process, so it is unlikely that 'new work' approaches alone, such as work-life integration or mindfulness, for example, will make an inclusive organisational structure out of a hierarchical one. These concepts have their justification and can be sensible and effective – but only if the structural and organisational foundations for them have been laid in parallel. Unless you go the whole hog, the logical result will just be frustration and resignations. 'New work' cannot be lived out in hierarchical top-down structures. If you give the INCLUDE approach a chance as a leader, then you will notice that your organisational culture will change, and that 'new work' will come about practically as a by-product of your organisation's inclusive development. Wherever leaders and employees make decisions together in line with INCLUDE, they will take the opportunity to shape their working environment is a way that is as optimal as possible for both the organisation and for teams and individuals.

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[2] The project that preceded INCLUDE and was also funded by the EU, 'Inclusive Leadership', did not, for example, go beyond the first two INCLUDE areas of development. Through its focus on 'inclusion' it was nevertheless able to make a significant contribution to the leadership debate. We therefore warmly recommend the materials published under the project 'Inclusive Leadership' to anyone who would like to develop primarily in the areas of development 'leader' and 'people'. These materials were only minimally drawn upon again for this handbook and can be used by INCLUDE leaders as supplementary teaching and learning materials. It is available free of charge here: https://inclusiveleadership.eu/

INCLUDE is not about introspection – why you should always look outwards!

The five INCLUDE areas of development outlined in turn below have one thing in common: each area of development is introduced from both an internal and an external perspective. There is a good reason for this. You can only be successful if you as a leader, your team members, and your entire organisation constantly take the external world around you into account. Everything else would simply be introspection. The reality of the markets or target groups that you are addressing and the people or groups acting around you will determine how successful your organisation can be. This external reality must not simply be allowed to 'play along' in all your activities as a leader. It should take on a leading role.

An example to make this clearer: imagine that you place more emphasis in the future when it comes to your working processes on self-organisation, autonomy, and faster, agile decision-making processes (INCLUDE area of development 'process'). If you do not at the same time grant to your teams and to the individuals who have gained these freedoms direct access to the customers or target groups that you are developing new products or services for, for example, then the following can occur: the actual needs of the target groups will not be sufficiently integrated into the decision-making process – the development will at least partially miss its target and these new products will not be as popular with the potential users as they could have been.

Area of development 1: ‘Leader’ – self-reflection and self-awareness

In the digital age, leadership with regard to the further development of one‘s own person means critically reflecting on one‘s own behaviours and roles in organisation. Digital transformation starts with each individual personally.

In this area of development, it is a matter of having the courage to engage in self-exploration and to examine one‘s own patterns of thinking and behaviour. Knowing yourself better is a prerequisite for developing as a leader. In particular, it encourages acting more authentically as a person. This reduces stress caused by the fact that people often feel compelled to play a certain role in their professional positions. If you consciously choose not to play a role, your own work will come more easily to you. In addition, cooperation with colleagues can change positively. The point is to make sure that you personally are doing well at your workplace. However, no one can take the responsibility for this away from you (see School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

At the core of the ‘leader’ area is the question **of the extent to which you, as a person in the digital age, are prepared to develop further and change your behaviour if necessary. Self-reflection is a central concept for this** and the starting point for all further initiatives that you will tackle in dealing with the challenges of the digital age. The following applies: Before you can successfully lead your organisation through the digital age, you must become aware of your previous behaviour as a leader. Before the digital transformation of your organisation comes your very personal mental transformation. New leadership behaviour always starts with you. To adequately face the challenges of the digital age it is not enough to work on the right adjustment points in your organisation or on the decision-making processes. You should be working through a personal process of development at the same time.

Another **key concept** when you start **this engagement with yourself is learning**. You will get to know yourself better and learn new behaviours, tools and methods that change and improve your leadership behaviour. Learning also includes the willingness to **actively unlearn** ingrained and possibly no longer suitable behaviours or to replace them with new or more suitable ones.

There is also much to discover **in the area of relationships with employees, superiors and colleagues**. The **central concept** here is **authenticity**. As an INCLUDE leader, you have the chance to take off the mask that so many people put on almost as a matter of course in their working lives. Instead of playing a role, you can increasingly be yourself. Personal interaction with others in your organisation becomes more relaxed and trusting.

For many INCLUDE leaders, being authentic also means admitting to themselves that they are at least partially overwhelmed as leaders by the current upheavals of the digital age. If you learn to better assess your own limits, then it will be easier for you in the future to allow more decentralised decisions as a leader, for example, and to no longer want to control everything and everyone. Instead of hubris, which characterises so many leaders (Kruger/Dunning 2009), INCLUDE leaders practice active self-restraint. When it comes to traditional leadership, less is more in the digital age. Paradoxically, this is what makes you truly effective as a leader again.

To make it easier for you to embark on the journey towards yourself, you can keep in mind what your future prospects are: You will achieve better results as an INCLUDE leader and you will have to work less hard to do so. The goal is to work successfully and live better. Your life is too valuable to let it be dominated by an outdated work environment. For your own sake, take the pressure out of your work life. You can only do this if you first get to know yourself better and decide for yourself what you want to do differently in the future.

Anyone who is not yet convinced that now is exactly the right time to decide on new leadership behaviour should perceive our digital age for what it is. A radical upheaval of all existing conditions. Digital transformation is a revolution. It is revolutionising the way we work together in the future. Our old 'factory system,' which has served as a model in this way not only in production but also in all office activities, has had its day. For example, we no longer need to congregate in open-plan offices in office complexes to work effectively. The world is becoming remote and INCLUDE leaders can successfully lead or operate in this new world order. The digital revolution is also rapidly changing the way we work. You decide whether you want to take action now or need to react later.

Area of development 2: 'People' – developing relationships

Leadership in terms of working with your staff and colleagues in your organisation in the digital age means taking time to build relationships with the people who work with you and for you.

Relationships need to be built and nurtured. INCLUDE leaders accept this challenge and are aware that they will spend a relevant part of their working time communicating with individuals or in teams. The basis of this relationship work is the willingness to value the contribution of each individual. It is about fostering diversity in an organisation as much as possible and recognising differences in e.g., personality, background, and experience as potentials for innovation. Inclusive leaders act with the mindset of accepting other approaches and consciously handing over responsibility (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

At its core is the question **of how you want to work together in the digital age with the people with whom you are closely connected through your roles or responsibilities in your organisation**. The **central terms** in the internal relationship here are **trust and responsibility**. Trusting relationships develop when there is appreciative and transparent communication both bilaterally from person to person and within the team. This also includes a fear-free working environment with an appropriate culture of error tolerance that encourages people to take their own initiatives. At the centre of a trusting cooperation is the appreciation of the person. In such an environment, it is forbidden for superiors to formally treat subordinates like 'means of production' that are moved from A to B depending on their benefit to the organisation. If you want to achieve something together with other people in the team, then you must act as much as possible 'at eye level, relationship-oriented and uncomplicated' among each other (Sassenrath 2017: 66).

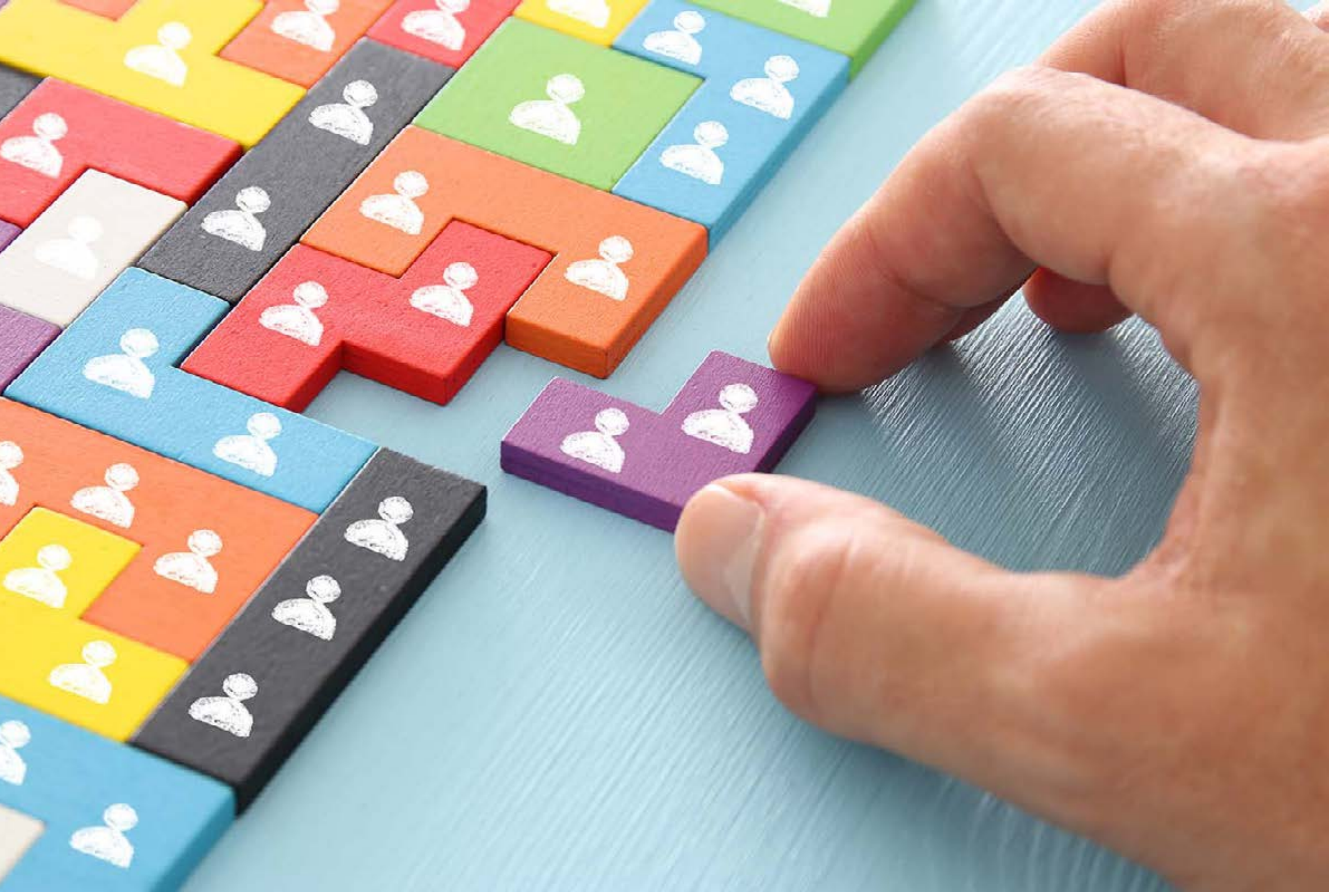
INCLUDE leaders share **responsibility**. Shared responsibility, e.g., for the work results in a team, can arise when leaders both encourage and demand the assumption of responsibility. INCLUDE leaders follow the motto 'doing things with people rather than to people' (Hollander 2012: 9). In this way, they break through the classic division of roles between leaders and followers and allow the roles to change, e.g., depending on professional competence.

Relationships also play a decisive role in external relations, e.g., in personal contacts with customers or with your suppliers and your service providers. INCLUDE leaders therefore try to organise the work processes in an organisation in such a way that as many people as possible in an organisation have direct customer contact. Experiencing the positive results and the value of one's own work directly with the recipient of a service directly conveys meaning and makes people proud of what has been created. Critical feedback, on the other hand, provides a direct impulse for suggestions for improvement combined with the personal incentive to directly stimulate these improvements within the organisation. In addition, with frequent and direct customer contact, suggestions and ideas for new products and services are brought to the organisation much more directly. The outside world, which is changing rapidly in the digital age, is given a better chance to influence the internal structures, processes, and offerings of an organisation. Both the ability to change and the speed of change of an organisation benefit from this in the long term.

If the foundations for more self-organisation, autonomous decisions, decentralised assumption of responsibility and trusting as well as cooperative collaboration are laid in the personal relationships among each other, then these INCLUDE characteristics can also have a positive effect on a larger scale in the structures and processes of an organisation. Any leader who does not start working on their INCLUDE relationships in the small things in their direct personal sphere of influence will find it difficult to be effective in the big things when it comes to structures and processes in the organisation.

INCLUDE behaviour must allow for honest feedback in both directions. In particular, hierarchical subordinates must have the confidence to give honest feedback to their superiors. Those who manage to do away with superiors in the traditional sense and start experimenting with teams without explicit supervision, for example, might be surprised at the positive dynamics this creates (Sassenrath 2017: 66).

If trust and responsibility are to prevail in an organisation, then everyone involved should have an honest share in the common success. Although it may come as a surprise, the first step is to consistently abolish all personal bonus systems. Individual performance-related bonuses almost always create an incentive to disadvantage colleagues and customers for one‘s own benefit or even to take advantage of them. In sales, for example, this behaviour leads to selling customers inferior goods. In such an environment, which salesperson would be interested in passing on changing customer wishes internally? If the product sold no longer works, the salesperson can simply ‘hire on’ at the next company. A company that is forced out of the market by a new digital product, on the other hand, cannot ‘move on’ so easily. The digital transformation will therefore only succeed if incentive systems are created in organisations that create ‘skin in the game’ (Taleb 2018) for everyone. To achieve this, all participants must actually take responsibility for their decisions and their role. This will only work if they also have a measurable risk, thus ‘skin in the game’. It is worthwhile for INCLUDE leaders to work actively on such systems.



Area of development 3: 'Structure' – I, my team, and my organisation

Leadership with regard to the further development of the structure of an organisation in the digital age means questioning the existing structure and initiating changes where necessary. This concerns both one's own role, e.g., with regard to a team or a department. And finally, it also means casting a critical eye on the structures of the entire organisation.

At the core of all aspects of structure in an organisation in the digital age is the question **of how people relate to each other in an organisation**. The **central concept in the internal relationship** is **'power'**, whereby the holders of this power can bring to bear firstly their **informal social influence (informal structure)**, secondly their **reputation as a performer (structure of performance)** and thirdly their **formal position in the hierarchy (formal structure)** in order to effect change within the organisational structure as leaders. According to Silke Hermann and Niels Pfläging (2018), these **three areas of power or influence** exist within the structures of every organisation. Power or influence is neither positive nor negative. It is a fact that people have influence on other people. The only relevant question is therefore how and for what they use this influence or power.

From this perspective, leadership always has a normative dimension. Leaders can use their position in the hierarchy for personal gain or abuse it to the detriment of their subordinates and colleagues instead of using their influence in the interest of the organisation. A central question in this context is to what extent the structures of an organisation can be organised in such a way that there is an incentive to use personal influence within the organisation in such a way that it becomes effective in terms of the organisational goals. Acting 'politically' in your own interest or in the interests of your department, for example, is a common trait of 'formal' authorities and usually damages the organisation as a whole. The result is departmental thinking or a silo mentality that is by no means only present in larger enterprises or organisations.

For INCLUDE leaders, it is therefore important to consistently tear down existing 'walls' or at least make them more permeable as a first step. On the one hand, this applies within the organisation, for example by creating more transparency so that knowledge is not 'hoarded' in individual organisational units. On the other hand, organisations should also open up much more externally, so that they, for example, develop their relationships with their suppliers along their value chain from a pure client-contractor relationship more in the direction of partnership. The **central term** from the perspective of an INCLUDE leader in **external relations** is therefore **'partnering'** (cf. Sassenrath 2017: 26).

It is no surprise that most ideas and proposals for developing an organisation focus on the 'formal' structure or on the 'formally' defined roles and responsibilities. Most people almost reflexively think of the structure of an organisation only in terms of this 'formal' structure, i.e., existing hierarchies or the relationships between different departments. In our mind's eye, the image of an organigram arises almost automatically. This is understandable, but not sufficient if you as a leader want to make a difference structurally in the digital age.

Only those who, as inclusive leaders in the digital age, know the 'formal', the 'informal' as well as the 'structure of performance' and precisely analyse the constellations of power or influence that go along with them, are in a position to successfully exert influence in the structural area. You should always think in advance about how possible interventions in your organisation's system will affect all three structures and what reactions can be expected. For example, consider which power holders you need as supporters in order to achieve a desired goal more easily with an intervention.

Area of development 4: 'Process' – living a shared vision and creating change

Leadership with regard to the further development of an organisation's processes in the digital age means developing work and decision-making processes in such a way that all members of an organisation want to achieve a common vision and support or, at best, initiate necessary changes in this direction.

Filling a shared vision with life means being open and inviting real participation, for example in a change process. This means to rely on everyone's participation from the development of a common vision for the future of an organisation to the implementation of this vision and to motivate everyone to make an individual contribution. 'Co-visionaries' can be inspired at all levels of the hierarchy and become active co-creators (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

Bringing about change and daring to try something new are central components of leadership. Change processes become inclusive when as many actors as possible are involved, both internally and externally, for example, when they consciously go beyond the boundaries of the organisation. Bringing about change together promotes a sense of belonging for all those involved (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

At the core of all aspects of process improvement in an organisation in the digital age is the following question: **Who does or decides what, when, how, with what, for whom and above all why? The central terms in the internal relationship are self-organisation and agility. Self-organisation** means consistently orienting all processes towards the autonomy of individuals and teams, decentralised decisions, shared responsibilities, and the broad participation of all. **Agility**, understood as the ability of an organisation to adapt to a rapidly changing environment, is the central prerequisite for success in the digital age (Sassenrath 2017: 29). Core characteristics of processes in agile organisations are an increased speed, e.g., in the implementation of innovations, a trial-and-error mentality instead of a planned economy and implementation of targets, a step-by-step approach that allows for mistakes and values them positively as a learning experience, as well as the willingness of all participants to take calculated higher risks. If these self-organised and agile work and decision-making processes are consistently aligned with the values of an organisation, the vision, and the long-term goals, then the transformation in the digital age can succeed.

The **central concept in external relations** is the **customer** or **target group for whom a product or service is provided**. Customers or target groups are those who actually pay for a product or service or who benefit from a it. Organisations that want to survive in the digital age must consistently align their processes with the benefits for their customers or target groups. This is not primarily about improving processes for already existing products. The much more important question is: What is the most important problem that our customers currently have and that we could solve (Rodgers 2016: 7)? Leaders who ask this question automatically align their processes with new solutions and the products of the future.

When it comes to processes, organisations

that have formally defined processes, e.g., as part of an ISO 9001 certified quality management system, run the risk of focusing too much on these processes. This is a mistake. Often, it is precisely these processes that lead to internal organisational rigidities and resistance along the lines of 'these are our standards and we have always done this'. As a leader in the digital age, you can try to set the first impulses in the process area first in those areas where formal processes are affected as little as possible.

Your goal should be to develop your organisation step by step from a departmental organisation to a process organisation (Sassenrath 2017: 85). Smart, customer-focused processes with as much self-organisation and agility as possible are more important in the digital age than individual results, e.g., meeting a cost or turnover target. The best thing to do is to abolish rigid rules, specifications, reporting obligations and results targets as far as possible. Then everyone involved can concentrate on actually living the shared vision and looking for what is really needed in the future. For the digital age, it is truer than ever: you cannot plan the new, you can only discover it (Sassenrath 2017: 15). Smart work and decision-making processes are the key to making as many discoveries as possible in the digital age. The more the better. It then becomes more and more likely to find a treasure every now and then.

Area of development 5: 'Technology' - dealing with the driving forces that change the world

Inclusive leadership at the start of the 21st century can only work if you as a leader deal with the new technologies that are make a lasting impact on our society and world of work. The 'digital age' is one of the most important factors affecting leadership today and in the future. This is why leaders should make it their goal to embed the discussion and use of new technological developments in their organisation's DNA. You can find a more comprehensive portrayal of what this is all about, including an introduction to ten central technological developments that every leader should know, in chapter 7.

The new technologies and the resultant digital transformation of our society mean that every organisation should internally and critically re-examine their current **business model**. Another challenge is dealing with and integrating **new digital forms of work** such as remote work in every organisation's structures and processes.

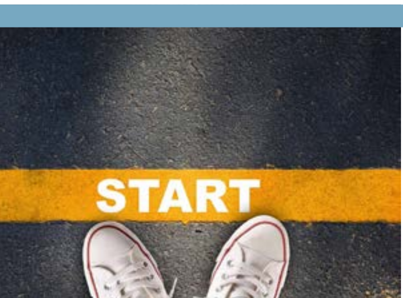
The concept of a business model is, among other things, all about building an organisation that is more robust in the future so that it can react more confidently to rapid change and even to unexpected negative or positive external events. For organisations working in areas that have been radically transformed by new technological developments it is not enough, however, to only undertake basic changes to their business model. Many people will have to rethink their organisation and the way that it organises its services to its customers or target groups from the ground up. This is the reason why it is crucially important for leaders to know or learn how they and their teams or employees can develop and implement a new (more digital) business model.

Looking outwards, the key terms in this area of development are **dealing with complexity and risk and opportunity expertise**. These factors are just as relevant for leaders as for all employees. It should be important to leaders that they themselves and all those around them are constantly developing these skills. This is the only way for them to be equipped for the challenges that will face them, on the one hand, and to better assess and use the opportunities that are open to them and their organisations, on the other hand. The latter is far more significant when it comes to dealing with new technologies.

All important aspects that effect the area of development 'technology' are directed towards the future. No one can know, however, what exactly this future will entail for their organisation. Leaders and their teams in the digital age should therefore care about learning how to make better decisions about the future despite all the current uncertainties. This is possible and in chapter 7 we provide you with an overview of how you can achieve this. A heightened ability to predict the future can, amongst other things, be combined with the use of suitable heuristics, for example, to help you make better decisions about the future and at the same time make a lasting improvement on your organisation's resilience.

Leaders and teams that enjoy rediscovering themselves have a clear advantage when it comes to dealing with new (digital) technologies. We are living in an age of 'creative destruction' (Schumpeter), and you can decide together with your team whether you would like to stand on the side that proactively contributes to these changes or rather waits until the waves around you have grown so high that they threaten to sink your organisation's boat.

The five areas of development introduced here each represent a significant challenge for all inclusive leaders and for anyone who wants to become one. INCLUDE leaders should make an effort to grow in all five areas. To make this process easier for you, we have designed step-by-step instructions for you in chapter 4 that will explain to you practically how you can shape both your own and your organisation's process of development is such a way that gradual but also quick development becomes possible – alongside your daily work.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04

The INCLUDE Model Understanding the Process step-by-step

Introduction

With the INCLUDE process model we are providing you with a set of step-by-step instructions so that you can familiarise both yourself and your organisations with the challenges of the digital age that were outlined in the previous section, and so that you can successfully shape the future of your organisation.

INCLUDE offers practical support that makes it possible for you individually and for your team to systematically develop themselves in all five of the INCLUDE areas of development. The best approach is to make use of INCLUDE directly on the job. The implementation of the INCLUDE process model is geared towards being tried out with tangible, practical challenges in your organisations as far as this is possible. This means that learning, trying and practicing when using INCLUDE will lead directly to results that will make your organisation better prepared for the future.

'Step-by-step' should be taken literally when it comes to the INCLUDE approach. There is no patented recipe for success, no single script for change that an organisation can simply run through to automatically develop a new leadership culture that is capable of living up to the challenges of the digital age.

Every company and organisation has to 'write' its own specific and unique script. The INCLUDE process model offers a set of step-by-step instructions for anyone who wants to start this journey. INCLUDE offers a structured, gradual process. It is by trial and error, by practice and experimentation, that you will find out what works in your organisation as you use this process. You will just as quickly find out what does not work and be able to quickly discard it again.

Your motto: 'It's safe enough to try' and 'good enough for now'

The principles undergirding the INCLUDE approach are taken from sociocracy: 'it's safe enough to try' and 'good enough for now' (Priest 2015; Thönnessen 2018). In the course of following INCLUDE's step-by-step approach you will be repeatedly faced with the question of whether there are serious objections to a new approach or a particular idea. There will always be serious objections if it could bring the goal of the process of change or the organisation as a whole into danger. If this is not the case, then it can be tried out.

No idea or suggestion has to be perfect. It is much more important that an idea or suggestion is 'good enough' to be tried out. It is not necessary to give a precise delineation of what constitutes a 'serious objection' or what 'good enough' means. Those involved will generally be able to decide this well on the basis of their practical knowledge. If you and your team follow the INCLUDE steps that are presented in detail below, then the motto applies: anything that is 'safe enough to try' and 'good enough for now' can and should be tried out. If it does not work, then it can be discarded again without much hassle.

The tools and methods of the five INCLUDE areas of development

In this handbook we provide you with a broad set of tools and methods for the five most important areas of development on the way towards leadership in the digital age. Choosing between the respective tools and methods is something that you or your team will need to do yourselves in the course of the step-by-step process. The methods and tools that you choose should match your organisation and be further developed or adapted as the need arises so that they function within the context of your organisation. You need to bear in mind whilst doing this that there is no such thing as a best practise tool or method. There are only tools that have previously worked well for other companies within other parameters. In particular, this means that no tool or method should be carried over in its identical form (cf. Sassenrath 2017: 76ff.). Be creative and keep adapting your tools until they help you.

Are there limits to INCLUDE?

Good leaders will know that you cannot transform traditionally developed, hierarchical organisations overnight into a holacracy, for example. To do this requires several interim stages and a long process of development. In addition to this, even with all of the advantages that, for example, the trend towards more self-organisation brings, formal decision-making structures and responsibilities have not at all lost their validity. However, in the digital age they are simply one of many aspects that needs to be taken into account. Who wants to be sitting in an airplane where the first response to a sudden loss of cabin pressure is to discuss the best plan of action with each of the passengers? This example of an airplane is a good way of showing the usefulness of the INCLUDE approach. It might surprise you, but it is actually the case that the pilot should not be the only one to make decisions when there is a problem in the cockpit. It has been shown to be very advantageous to incorporate information and opinions from the rest of the flight crew in the decision-making process whenever possible (Gigerenzer 2020). Even in such an example the inclusive way leads to better decisions – to such an extent that lives are thereby saved.

It is all about establishing an appropriate combination of leadership and decision-making instruments, so that hierarchical structures and self-organisation can be combined in an organisation. In the future, both of these can and will exist side by side in every organisation and company. With the INCLUDE approach you have the opportunity to lend more weight to the powers of self-organisation.

Two phases: you first, and then your organisation

INCLUDE's step-by-step approach consists of two main phases, each of which can be subdivided into five consecutive steps. The first phase is all about you as a leader. You can carry out this self-assessment phase almost entirely without involving any third parties. As a future inclusive leader, you should start with yourself. You will then be better placed to accompany your company or organisation through the INCLUDE process of change.

The second phase involves your entire organisation. Your goal must be to win over as many employees and stakeholders as possible for the collective process of organisational development. Together with these employees and stakeholders you will learn and try out new forms of collaboration, decision-making and responsibility etc., practice these in your daily work, and, where appropriate, establish these new approaches within the organisation.

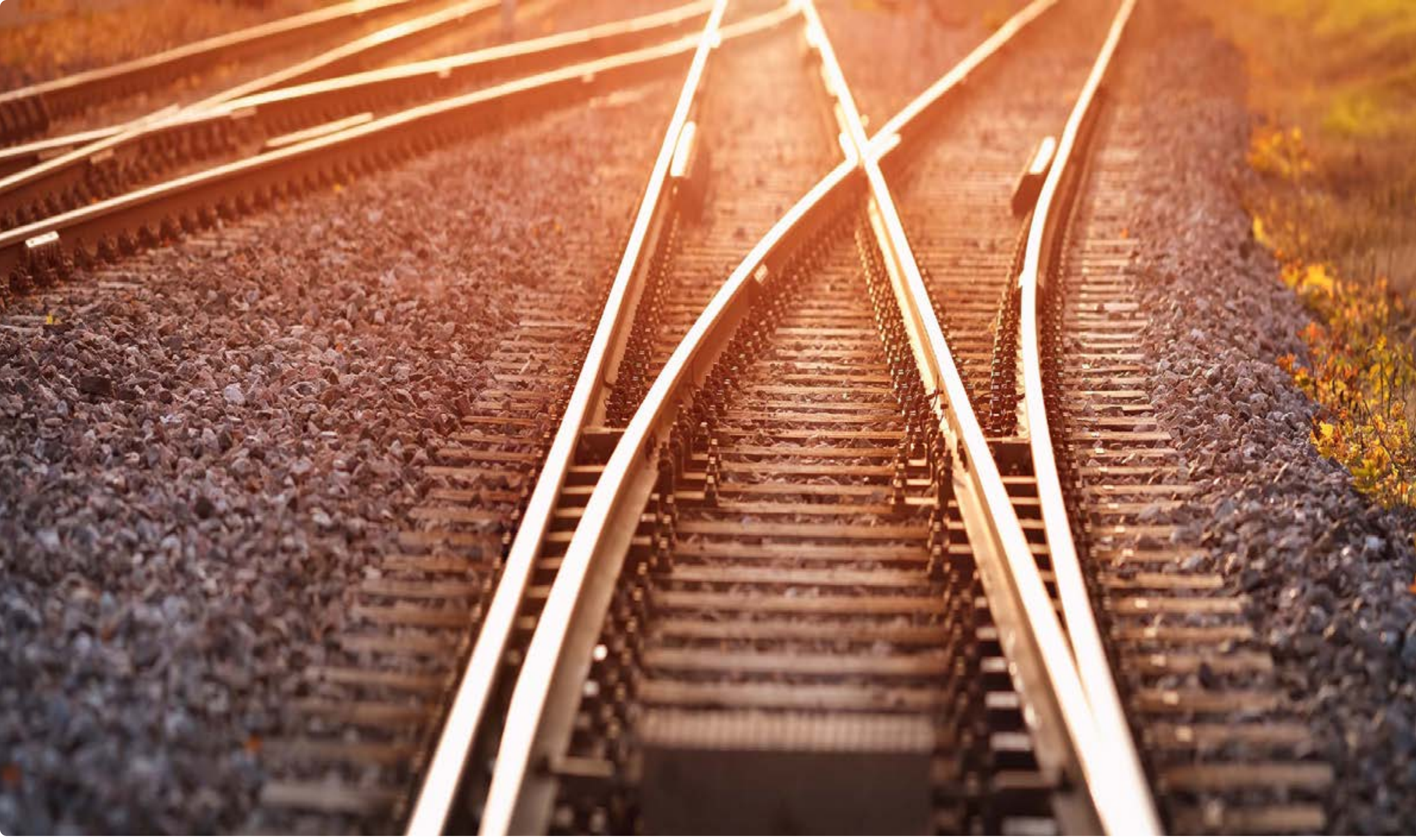
In both phases you should start with the tools and methods that will provoke as little resistance as possible. There will almost always be suggestions or ideas that do not immediately lead to frowns or doubts among the audience. For some ideas you will even be quick to find support, for example if you suggest that all regular appointments and meetings should be put under review. You do not need to demand straight away that all meetings be abolished. It is enough to assess their length, frequency, goals and content, as well as the manner of communication (cf. Sassenrath 2017: 77ff.).

Processes of change require time, or 'take it slow when you're in a rush!'

The digital revolution can mean that you are currently feeling under very great pressure to change. More and more leaders are noticing that 'business as usual' does not help when digital disruptions are quickly changing entire business sectors. It is, however, especially important to note the following when your organisation or company is facing large challenges right now that cannot be put off anymore: proceed calmly, take one step at a time and do not lose your head or your sense of priorities as you move ahead. An old Japanese saying summarises this attitude well: 'Take it slow when you're in a rush'. Another variation of this proverb is: 'When you're in a rush, make a detour'.

With the INCLUDE approach we are offering you a 'detour' that can bring you straight to your goal. You must, however, be prepared to invest the necessary time and to have a certain amount of patience, because potential changes do not appear overnight. From our experience we can clearly tell you the following: a lot of progress will become visible even during the course of these ten INCLUDE steps. This is because you will be spending the whole time working on the challenges facing you right now. There is nothing theoretical about INCLUDE. Only things that have already had repeated practical success have made it into the INCLUDE approach, so that you can achieve your first tangible results as quickly as possible.

One thing to note about the time required: you will be able to carry out the first 5 steps of self-assessment (first phase) in around three months. This is the amount of time that leaders should take to get to know them-



selves better on the one hand, and on the other hand to be well prepared by the time they start the second phase. You should allocate around six months for the second phase, which is again divided into five consecutive steps. Once you have completed all of the ten INCLUDE steps there is time to take stock and to assess the progress that has been made.

As a general rule, changes in complex systems such as companies or organisations last longer than the period of around 9 months that we have estimated for a complete walkthrough of INCLUDE (Sassenrath 2017: 79). The INCLUDE approach has therefore been developed in such a way that it can become a permanent companion in the ongoing development of your organisation. We assume that you will have an appetite for more of INCLUDE after your first walkthrough. The success that you will have had by that point will speak for itself, and you will be able to decide whether or not to implement steps six to ten from INCLUDE as a permanent process in your organisation.

Before we are ready to go on, there is one first brave step required. You have to personally want to develop yourself into an inclusive leader. The following 12 principles will help you with this by giving you a sense and foretaste of the positive changes that you will encounter.

Your nindset for change – 12 principles for the INCLUDE leader

What does a mindset look like that fits the reality of our companies and organisations in the digital age? The following 12 principles distil what really matters when you want to successfully navi gate yourself and your organisation through our digital age (cf. Hermann/Pfläging 2020: 111ff. and Sassenrath 2017: 39ff.).

Allow more autonomy

If the autonomy of each individual and team is increased, then these will be able to respond more independently and appropriately to signals from, for example, your customers. By contrast, those who are focussed only on their careers will rely on the favour of their superiors and will simply 'tell them what they want to hear' instead of developing innovative ideas that revolve around customer requirements.

Support federalisation

Departmental egoism and silo structures can be overcome if small, authorised and cross-functional teams straddle departments and orient themselves around the needs of their customers. Those who support federalisation will make a decisive impact towards better collating and using important knowledge within the organisation.

Make self-organisation possible

Individual employees and teams will shoulder more responsibility if you forego micromanagement and top-down demands. The decision-making process will become more inclusive. There is a good chance that fewer wrong decisions will be made by overstretched leaders and the entire decision-making process will be accelerated. This will allow the organisation to react more quickly to the requirements of the market and to changing parameters.

Set up alternative measurements of success

If you stop focussing on growth, market power and maximising profit, and start paying attention to what fits the internal culture of your organisation and to creating values that are important in terms of your customers, then you can expect success that goes beyond the one-dimensional performance figures. One positive side effect is that, alongside all this, the classic company metrics mentioned above will also improve.

Create transparency and share information

When all necessary information is available to people and teams that can make decisions de-centrally and autonomously, then more economically viable and intelligent decisions can be made. In the hierarchically led structures this means that you as a leader must forego power. You will be rewarded, however, in that your own workload will be reduced. In addition to this, you will no longer make poor decisions that have mostly remained unquestioned for far too long in a hierarchical world.

Why is this? Because in organisations that are led from the top down, leaders generally won´t be given honest feedback.

Find sensible long-term goals

Once you forego short-term targets and extensive measurements of goals or key performance indicators (KPI), then space will emerge for you to get up to speed with the demands of a living and complex environment that cannot easily be planned. This is the reality of the digital age. Sensible and long-term goals enable flexible reactions and offer more room to manoeuvre. It could be something like this: our products and services should be significantly better in five years than they are today, we want to use this to generate more income, so that our entire body of staff from cleaners to CEOs will earn a greater amount.

Enable another participation in success

Once individual performance assessments or incentives such as bonus systems have been abolished, other models will take their place that allow all employees in an organisation to be genuinely involved in its success. Sufficient income is just one dimension of this participation. Added to this is the fact that current incentive schemes which are tied to individual performance have negative effects. They undermine, for example, the willingness to cooperate within an organisation and can lead to customers not being sold the right product. This may increase revenue in the short term, but it will also offer your competitors a large gateway to offer better products and services.

Plan less in order to be more agile and faster

Once you stop constantly planning every little detail, you will be able to use the time you save to be more alert and to react to your constantly changing environment. Agility, flexibility and speed are necessary if you are to react appropriately to quickly changing conditions. The worldwide corona pandemic has shown, for example, that organisations and companies were able to adapt to a new state of play within a short space of time and even to use this as an opportunity. You will lay the necessary foundation for this by reducing your planning to a minimum.

Don't orient yourself around the fiscal year

Once you uncouple decisions from the fiscal year or from quarterly goals, amongst other things it will mean goodbye to December fever! You will never again have to throw money away at the end of the year. The pace of work in an organisation and the supply of necessary resources has little to do with which period our national tax administration deems appropriate for determining our tax liability. Organisations work more like interval training: several short sprints are interspersed with phases of analysis and assessment in order to make significant progress in a suitable timeframe. Self-organised teams should decide themselves how much time is required for this. They can do this primarily independently of a budget that is tied to the calendar and in a way that uses their resources economically and meaningfully.

Abolish bureaucracy and allow those who are best suited to do their work

Once you have abolished as many rigid rules and reporting obligations as possible, you will no longer be constantly chasing the real demands of the market or your customers. The 'top' and 'bottom' of an organisation will disappear when decisions are consistently made in an unbureaucratic and decentralised way by individuals or teams who are best qualified on the basis of their expertise and who orientate themselves around the long-term goals and values of the organisation.

Distribute resources differently

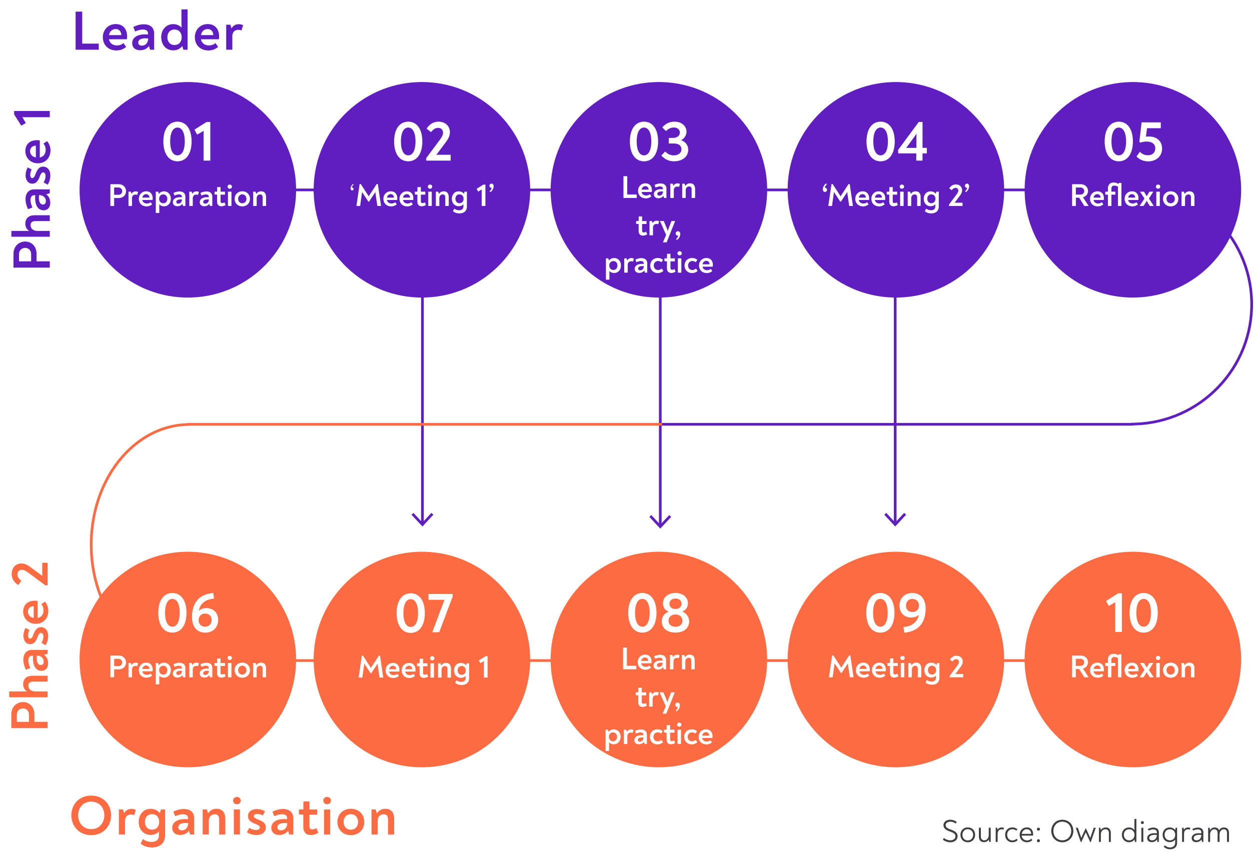
If you want decisions to become decentralised, then you will have to equip the decentralised units with the necessary resources. This is the only way for them to receive the autonomy that will enable them to act. This means, however, that there is no longer room in the organisation for those who love their own status, who think something like 'I'm important because I have the highest budget at my disposal'. This is something that inclusive leaders will need to accept.

Let reality play its part

Once you have abandoned the centralised and static distribution of resources and responsibility, our often rapidly changing environment will have the opportunity to exert more of an influence on your internal decision-making. In the place of a central planned economy in a company, a flow will emerge that creates more value for the customers and at the same time generates higher profits for the organisation.

With this mindset consisting of twelve simple principles, you will be able to keep up with the times as an inclusive leader. This clear and firm set of principles will make it possible for you to manoeuvre your organisation or company through the digital revolution. It is important to note that the twelve approaches to leadership in the digital age complement each other. They are not like a menu where you simply choose which one you like most. In chapter 6 in the tool 'BetaCodex' you will find out in detail why these twelve principles are so well suited to surviving and evolving in the reality of complex markets and new parameters.

How Can I Become an INCLUDE-Leader?



Source: Own diagram

We will now look at your first tangible step on the journey towards becoming an INCLUDE leader. It is all about taking the first decisive steps towards changing your organisation. Your goal is the following: firstly, you want to be able to better handle the challenges of the digital age yourself as an inclusive leader. Secondly, your organisation or company should be able to keep developing itself positively in this new reality. It would be ideal if your organisation could use the new (technological) possibilities to its own advantage, whilst simultaneously modifying the internal structures and processes in such a way that your entire work and decision-making processes take place in a more flexible and self-organised way.

Becoming an INCLUDE leader is a process that occurs in two phases. In the first phase you will set yourself as an individual on the right track and thereby create the necessary preconditions for you and your organisation so that you can take your team or organisation with you in the second phase. You will advance one step at a time and will be able to manage the speed of your process of change yourself. The time periods that we have mentioned will help to give you a general orientation. You should give yourself enough time for self-assessment, whilst at the same time making it possible for you to keep on managing your operational daily business well.

The INCLUDE process starts with leaders who hold positions of responsibility, for example managers or board members. Leaders who want to develop into inclusive leaders in the digital age begin this process by first dealing in detail with themselves, their patterns of thinking and behaviour, and the planned process of change. You should plan around 90 days for this phase of self-assessment (on the separate steps of the INCLUDE process cf. especially Hermann/Pfläging 2020).

First step: preparation

Let's start with the first step. Are you ready to actively deal with your own role and your (previous) behaviour as a leader? You will now lay the foundation for this. In this step you will analyse your individual situation and that of your company or organisation. You can now, for example, take a first glance at the learning resources and information that you have been provided with in this INCLUDE handbook. In tandem with this you can sign up to our INCLUDE email course[1] to receive further suggestions for your process of development. We suggest that you take around 30 days for this first step.

Alongside your initial induction into the topic there is also a specific task to complete in this step. This is to address an invitation to yourself. In this 'invitation to myself' you will note down as precisely as possible why you want to make this journey towards being an inclusive leader. You are also committing to reserving enough time for this important process and to creating a working environment that is as undisturbed and comfortable as possible. This is a serious invitation that should be undertaken in writing. You will set down an initial specific date, on which to deal in detail with the process of development that lies ahead. This will be done away from your normal responsibilities. Only one person will be invited to this retreat: you. In your 'invitation to myself' you will specify one or two days when this retreat can take place. We recommend actually sending this invitation to your own email address, for example as an email marked particularly urgent. This increases the sense of obligation and gives the whole process a fitting sense of importance. This is, after all, the start of a process of development that will change the entire organisation.

It is not hard to write an 'invitation to myself'. It should include the following items:

- An explanation why you would like to start the journey towards being an inclusive leader in the digital age.

[1] You can sign up for our free email course here: http://link.emcra.eu/INCLUDE_EmailCourse.

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- The challenges that face you in your company or organisation. You could note down in which areas there are currently problems to be overcome, for example 'We have noticed that the increased use of home office workstations has caused communication within the company to suffer and has led to increased mistakes and misunderstandings. We should start with this.'
- The time and place where your retreat will take place.

Second step: first 'meeting with myself'

Escape from your everyday routines. You are now going to treat yourself to a thorough break from your operational responsibilities and give yourself the chance to deal calmly with the topics that are of burning importance or that you have always wanted to look at in greater depth. It works best if you take at least two days for this and find a place where you can think and work with as few interruptions as possible. Your personal retreat offers you the chance to tackle ideas, experiences, perspectives etc. in relation to your role as a leader in your organisation. It is important that you turn off your phone and avoid all disruptions. Someone reliable should know how to reach you in the event that your business is 'on fire' and you are really needed after all.

This 'meeting' adapts the advantages of open space technology, thereby giving you 100% freedom to tackle only those topics and aspects of your own behaviour that are most important and most interesting at this point in time. It is important that you aim towards a tangible result. The goal is for you to develop a detailed plan of action for yourself with different priorities that you will be able to edit in more detail in the next step. In the instructions in chapter 6 of this handbook (see tool 'open space for leaders') we explain in detail what things you need to pay attention to in your 'meeting with myself' and what the programme should look like over this period of around two days..

Third step: learning, trying, and practicing

You now know where your priorities lie for the next while. The third step, for which you should plan around 45 days, will give you the opportunity to try out new methods or tools or to acquire new knowledge. You will now very practically step into the INCLUDE topic. You will predominantly be able to work in this step without involving anyone else, for example by getting to know and experiment with the tools in the INCLUDE handbook that are recommended specifically for the 'leader' area of development. Be open to new approaches. It is possible to be surprised, and this can lead to exciting new insights about yourself. We recommend that you get to know at least one tool from the other four INCLUDE areas of development in more detail alongside the tools from the 'leader' area of development. Choose the tool that can most likely help you solve the challenges that you identified in the 'meeting with myself'.

You cannot do anything wrong in this phase and, as long as no third party is involved, this process of self-discovery is 100% private. It is, however, possible to test the first tools and methods with third parties in this phase. This could be both with external contacts and with individuals or teams from your own organisation. For example, it would be possible to experiment for the first time with new forms of moderating internal meetings.

Or you could think about what you would like to discontinue or simplify in the future. Tidy up before starting something new. As an INCLUDE leader you want to work better but not more. Think about what you could achieve with less effort or, even better, set up a 'systematic waste collection' (Malik 2000: 373ff.) and eliminate time wasters that keep you back from things that really matter. The result will be that you have already created the necessary resources in terms of time before you start new initiatives as an INCLUDE leader.

A note regarding the time required for this. You obviously will not be permanently working on the INCLUDE topic throughout this period of around 45 days. Your daily business has to go on. It is, however, important that you keep setting aside enough windows of time throughout this period of around 45 days where you can both learn something about yourself and try out and learn new things without being interrupted. It works best if you reserve at least two appointments per week in your calendar right from the start, each lasting several hours. In the event that something urgent prevents you from attending one of these, you should also note down a third back-up appointment.

Fourth step: second 'meeting with myself'

A second private meeting, again carried out by you alone, forms the conclusion of the longer learning and testing phase. It will take place in line with the same basic principles as the first 'meeting with myself'. It works best if you plan and schedule the appointment in good time so that you can once again take a step back from daily business for one to two days of peace and quiet. The goal of this repeated individual retreat is for you to reflect on experiences and insights from the learning and testing phase as thoroughly as possible.

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Your second retreat has an altogether different focus to the first one. Now is the time to make decisions. First of all, you can decide for yourself which of the tools and approaches that you have experimented with up till now should actually become part of your new daily life as a leader. This means determining how and why you would like, for example, to make a conscious effort to behave differently in the future.

The most important question that you need to answer in this retreat is whether you are ready for the second INCLUDE phase. In other words, you are now deciding if the transformation of your organisation can begin. This means leaving the predominantly private space of self-assessment. You are bringing your team onboard and starting a journey together that will change your company as a whole. That sounds more challenging than it is, because this process of development can also be divided into separate steps and easily pursued in tandem with your daily business. You can plan the first appointments when you are ready for this phase of transformation. It may be the case, however, that you still need more time. In this instance simply run through the first four steps once again. Just bear in mind that there is no such thing as being perfectly prepared. Anyone who wants to discover and develop something new has to set out to sea and anticipate unchartered waters. In the digital age, the risk of doing nothing is much greater than that of searching for new shores one step at a time.

Fifth step: reflection

It is always a good approach to 'sleep over it' before implementing important decisions, even in normal day-to-day business. This is the reason why INCLUDE contains a step for reflection. In the course of this final period lasting around 15 days you will be able to linger over the experiences you have had so far. You will be able to further try out and deepen the developments and new patterns of behaviour that you have found to be good and helpful. In this way your new patterns of behaviour will be consolidated and even better adapted to daily realities.

You will also be able to calmly rethink the decision you have made about starting the phase of organisational development. Once the right time has come for the next phase then there is one more thing to do. You need to initiate the transition to the transform tional phase.

How can I facilitate an INCLUDE process of organisational develoment?

Once you or several leaders have gone through the first five steps of the self-assessment phase then it is time to begin the real transformation of the organisation towards a more inclusive understanding of leadership and organisation. This phase, just like the self-reflection phase, also consists of five steps. The individual steps will seem familiar to you by now.

You should calculate a total of around 180 days for this. Do not let yourself be put off by what may at first glance seem to be a long period of time. If you want to develop your organisation further, then this is never going to happen overnight. Firstly, the process of change must be feasible alongside your normal day-to-day business. In other words, the time it requires each week must be kept within limits. Secondly, you and your team or your company will need enough time to experiment. It is important that a lot of very positive changes are already possible within the period lasting around 180 days. You should not have to wait half a year for the first successes or marks of progress.

Sixth step: preparation

The sixth step helps to create a willingness amongst all those involved to change the existing organisational model. This creates the foundations of a successful ongoing development of the entire organisation. You will begin by analysing the organisation's current situation together with your team. The best way to start is by initiating a thorough process of discussion within your organisation and by providing new learning resources and information for this such as those that are available in this handbook, for example.

You will have formed a foundation for future changes when as many of those involved as possible have spent time considering new ideas or methods. You can, for example, increase an awareness that something needs to change by letting a team member briefly introduce the core content, opportunities and risks of a new digital technology at the end of a regular team meeting, for example big data, blockchain or artificial intelligence (AI)[2]. You can then discuss as a team to what extent this development could have an impact on your company in the future. By proceeding in this way during the preparation phase you are incrementally developing an awareness within your organisation that something must and can change, because this is the only way to secure the future of your organisation or company in the digital age.

There is a further specific activity that you must carry out in this step as a leader who carries formal responsibility. However, following the previous self-assessment phase (steps 1-5), this task will not prove to be particular challenging for you. You need to create an invitation to the first INCLUDE meeting for the whole organisation. In essence, this invitation will include the same content that you have already taken into account when you composed your 'invitation to myself' in the first step. You will explain why your organisation or company needs a new leadership approach for the digital age. You will also commit yourself to acting with all

[2] You can find information that is easy to understand about the most important new digital technologies in chapter 6 'digital transformation tool'.

participants without delay on the basis of the results from this first INCLUDE meeting.

The following aspects should be taken into account when you compose the written invitation (cf. Hermann/Pfläging 2020: 87ff.):

- You will communicate why the topic of the meeting is important for your organisation or business and why you would like to initiate a process of change.
- The invitation will convey the urgency of your request, for example with phrases such as 'Things are going badly in area XYZ of our business and we therefore need to …' or 'We now need to deal with the topic of XYZ in order to use these technological innovations' etc.
- You will provide the necessary information about open space methods (see chapter 6 tool 'open space for organisations') and about the INCLUDE process of development.
- The date and time of the event.
- You will give all invitees enough time to decide whether they would like to be there. All participants will be required to confirm their attendance in writing.
- You will make absolutely clear that participation is 100% voluntary. Anyone who would not like to attend should instead continue with their normal work.
- The invitation will be signed and sent by you individually.
- Once you have sent the invitation you will use all possible channels to raise awareness about the first INCLUDE meeting. Turn the meeting into a topic of discussion to be spoken about within the organisation. Use interactions with your team to draw attention to the upcoming meeting.

Seventh step: first INCLUDE meeting

Your INCLUDE meeting will be carried out according to the basic principles of an open space event (see the 'open space for organisations'-tool in chapter 6). The most important thing to remember is that participation is 100% voluntary. The idea of it being voluntary may perhaps cause you and even those invited to raise questions or feel sceptical about it. In our professional working environment, we are not used to anything being truly voluntary. But think of the situation from this perspective: can the introduction of a new culture of leadership, work and organisation be imposed from the top down when its very core consists of increased self-responsibility, decentralised decision-making and flexible working processes? The contradiction should be immediately obvious. This simply cannot work. That is precisely why there is just no alternative to voluntary attendance. It is all too understandable that this will involve a certain amount of scepticism from all who are involved.

There are further important arguments for attendance being 100% voluntary. Top-down requirements prevent real engagement. If someone is not on a voluntary basis, then intelligent and creative people will quickly 'opt out' and either not participate or only superficially act as if they support the process (Mezick et al. 2015: 2). But these are precisely the people that you desperately need for your process of organisational development to be a success. You can be sure of one thing: the people who are either barely or not at all persuaded of the new direction being taken will be at the meeting anyway. They will want to find out what is going on, even if it is simply to plan how they can best boycott the process. It is only with voluntary participation that you will bring the right people on board with whom your new leadership and organisational culture can be a success.

The first INCLUDE meeting will last between 1 and 2 days. In terms of content, it is about giving as many different perspectives as possible a chance to speak and generating new ideas. By no later than the end of the first INCLUDE meeting, all participants will find out that there will be a further INCLUDE meeting in about 90 days, by which time the results and suggestions of the first INCLUDE meeting will be tested or implemented as far as possible in the organisation on the basis of the prioritisation that has been collaboratively undertaken in this first event.

Eighth step: learning, trying, and practicing

The journey continues in a similar way to your personal phase of testing and experimenting in the third step. At the first INCLUDE meeting, amongst other things, new teams will have been formed. Ideally these teams will straddle different departments. Just like the already existing teams or individuals, these new teams will be explicitly authorised and invited to learn, try and practice new ways or working together, making decision or exercising responsibility. To help them with this, all those who are interested will be given access to the tools and methods that are presented in detail in this handbook under the five INCLUDE areas of development (leader, people, structure, process and technology). You will have around 90 days for this whole step of learning, trying and practicing. This will enable thorough testing alongside your daily business and will make it possible for the first results and improvements to be implemented on the job.

Amongst some of those involved there will continue to be scepticism about the new direction. This is normal. For the time being, assume in this step that a new approach can work, no matter how strange it may appear and whatever doubts you may have. As long as all new approaches are 'safe enough to try' then nothing can go wrong that is not easy to fix again. This will be enough to take the wind out of the sceptics' sails and to show everyone else who actively supports the process that they are not taking an uncalculated risk. It will also show them that, as long

as a new approach has not been internally nailed down, they can simply revert to their usual processes.

The twelve principles for INCLUDE leaders i.e., the mindset for real change that was presented in detail above, will serve as an important compass for all of the participants' activities in this step (on this point see chapter 6 tool 'BetaCodex' in detail). Additionally, as far as possible all five of the INCLUDE areas of development should be covered: leader, people, structure, process and technology. In a best-case scenario this means that more than one new tool or method should be learned, tested and practiced for each area of development. When doing this, all of the tools and methods that seem applicable to those involved should be utilised. Experiment with tools and try to discover and strike out in new directions with the entire organisation.

In this step it may also be helpful to actively involve external players, for example subcontractors or customers. Decide in advance which criteria will govern your cooperation with external stakeholders in this step.

Throughout these 90 days all teams and individuals will organise their way of working themselves. They will be authorised to work and communicate without further restrictions within the parameters of the twelve principles.

Ninth step: second INCLUDE meeting

A second INCLUDE meeting will take place at the end of the intensive ninety-day learning and practicing phase. This meeting will last one to two days and will be for the whole organisation. Once again, participation is 100% voluntary. The same open space rules apply as at the first meeting. Of course, everyone is welcome, even those who did not want to attend the first meeting or who were prevented from attending by legitimate reasons (holiday, illness etc.).

The focus of the second INCLUDE meeting, just like the second personal retreat in the fourth step, is different to the first meeting: you have completed a very important step in your organisation's process of development. The results you have achieved can now be assessed. All of the participants will reach a consensus in the course of the meeting about what worked well and whether they would like to keep working together in this new way in the future. It is therefore all about gathering the harvest from the testing phase and deciding what can be implemented into your normal day-to-day work.

In this meeting there will generally be a significant need for exchange and discussion about other areas in your company or organisation that also need to be developed further or changed. This is the way it should be. You will not be able to master all adaptations to the digital age in 90 days. What is important is that the first successes of self-organisation are already clearly recognisable by this point, and that they motivate all those involved to keep moving further in this direction.

Tenth step: reflection

The tenth step is once again there to aid reflection and to give all participants time for what has been achieved to sink in. You should calculate around 30 days for this final period of reflection. The newly learned forms of leadership in the digital age and of cooperation can be further consolidated. All teams and individuals will have time to reach an overall higher level of performance by taking what has worked up to this point and implementing it outside of the protective 'testing world' of step 8 and inside normal day-to-day work.

The 'eleventh step' – implementing INCLUDE as an organisation process

The INCLUDE steps that have been outlined up till now can and should be implemented again and again. This will embed new ways of working, whilst also generating and testing further innovative ideas and suggestions for change. This means that your 'eleventh INCLUDE step' is to establish the second INCLUDE phase, which is made up of steps six to ten, as a permanent process of organisational development. Tailor the steps in such a way that they fit your organisation. For example, if you schedule an INCLUDE meeting in open space format every six months, then the whole process will take on a life of its own and will simultaneously become part of your company or organisation's DNA.

In future walkthroughs of INCLUDE it is not necessary for your leaders to start again with the self-assessment phase (steps one to five). It is much more meaningful if all participants, including those who do not have a formally recognised leadership role, integrate this self-assessment phase as a permanent practice in their normal day-to-day work. There is one exception to this: new leaders that you take into your team from outside should ideally already know the steps of the first phase and should run through them right at the start when they join your organisation.

There are lots of mid-term and long-term advantages to an incremental INCLUDE approach. We would like to list the most important ones in summary form for you here:

- INCLUDE promotes a high level of commitment from all those involved.
- INCLUDE promotes self-organisation, decentralised decision-making and the autonomy of all those involved.
- INCLUDE is straightforward but not easy.
- INCLUDE reduces reliance on external consultants.
- INCLUDE leads to all those involved doing what needs to be done.
- With INCLUDE you can master the complex challenges of the digital age.

Which Tool Should be Used in which Phase of the INCLUDE Process Model?

The tools introduced in this handbook can be allocated to one or several of the five INCLUDE areas of development. As an INCLUDE leader you are completely free to choose the tools that you or your team believe to be best suited to the development of your organisation.

Some of the tools are, however, particularly important when practically implementing the ten steps of the INCLUDE process model outlined above. Because of this, the tools will be introduced below in the order that you should use them when going through the two phases of the INCLUDE process model.

Phase 1: how can I become an INCLUDE leader?

At the outset you will need the 'BetaCodex' tool in step 1 (preparation) to familiarise yourself with the foundational principles that should guide your process of change.

You should then use the tool 'open space for leaders' to prepare your personal 'open space' in step 1 (preparation) and to implement it in step 2 (first 'meeting with myself'). You will need this tool again later in step 4 (second ‚meeting with myself').

We recommend that you begin with the tool 'OK positions' in step 3 (learning, trying, and practicing) as an introduction to the INCLUDE tools. This tool will provide you with numerous insights into yourself and your team members (INCLUDE areas of development 'leader' and 'people'). We recommend the tool 'cell structure design' as a starting point for the INCLUDE areas of development 'structure' and 'process', amongst other things because it is significantly different to traditional top-down organisational structures and is particularly well-suited to small and medium-sized organisations.

Step 5 (reflection) marks the conclusion of this phase. In this step you will go back over the insights that have been gained up until this point and will integrate the tools that you have found to be useful into your daily management practices. In addition to this, you will lay the foundations for the transition to phase 2.

Phase 2: how can I facilitate an INCLUDE process of organisational development?

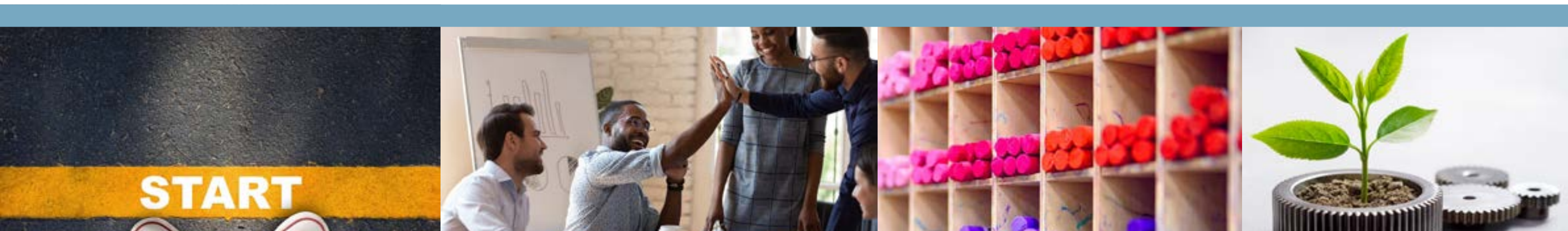
The process of development in your organisation starts with step 6. We recommend that you first focus on the most important technological developments that have the potential to spark lasting change in your life and in the life of your organisation. These technologies will be introduced in the INCLUDE area of development 'technology'.[3]

The tool 'open space for organisations' will support you and your team with steps 6 (preparation), 7 (first INCLUDE meeting), and 9 (second INCLUDE meeting).

In step 8 (learning, trying, and practising) we recommend that all those involved experiment with the tools that appear to be particularly well-suited to dealing with the challenges and opportunities in your organisation. For all those who find it difficult to choose, we recommend the tool 'team canvas' for the INCLUDE areas of development 'leader' and 'people'. The tool 'golden circle' is especially well-suited for developing the foundation for your new organisational structure and for new ways of working (INCLUDE areas of development 'structure' and 'process'). This tool helps you answer the most important questions for the future of your organisation: Why are we doing what we do? How are we doing it? What exactly are we providing?

At the end of the second phase, it is time for all those involved to reflect (step 10). In this phase you are creating the conditions for the results and new approaches to be established in your organisation's daily business.

[3] You can find a comprehensive and easily understandable presentation of these technological developments here: https://digital-transformation-tool.eu/driving-forces-²/.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05

At a Glance INCLUDE Tools and Methods

At a Glance

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Method	Structure	Process	Technology	Page
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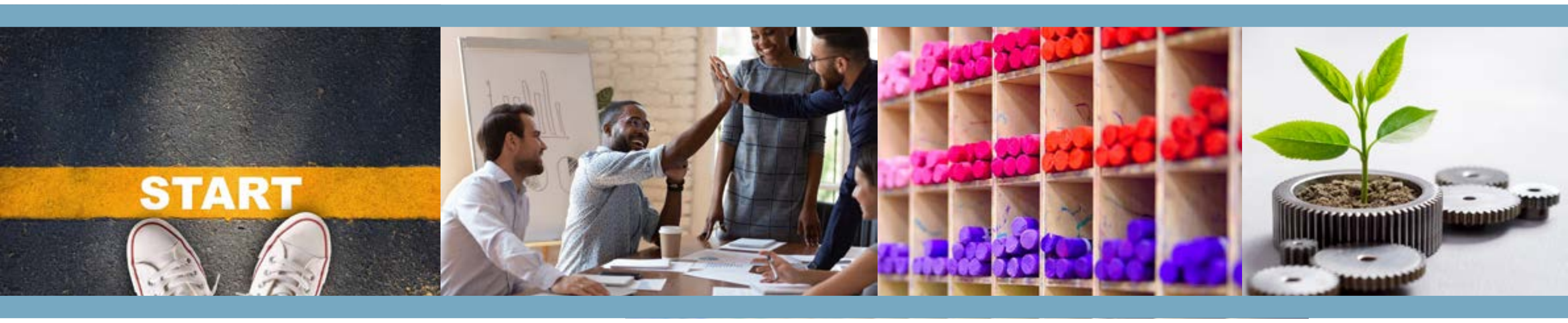
08	○	○	●	162
09		○		184
10		○	●	194
11				206
12				210
13				228
14	○	●	○	238
15	○	●		252
16				272
17				286
18	○	●		300
19				312
20		●		338
21	○	○		348
22	○	○		360
23	○	●		372
24				386
25		●		394
26				402
27	○	○	●	420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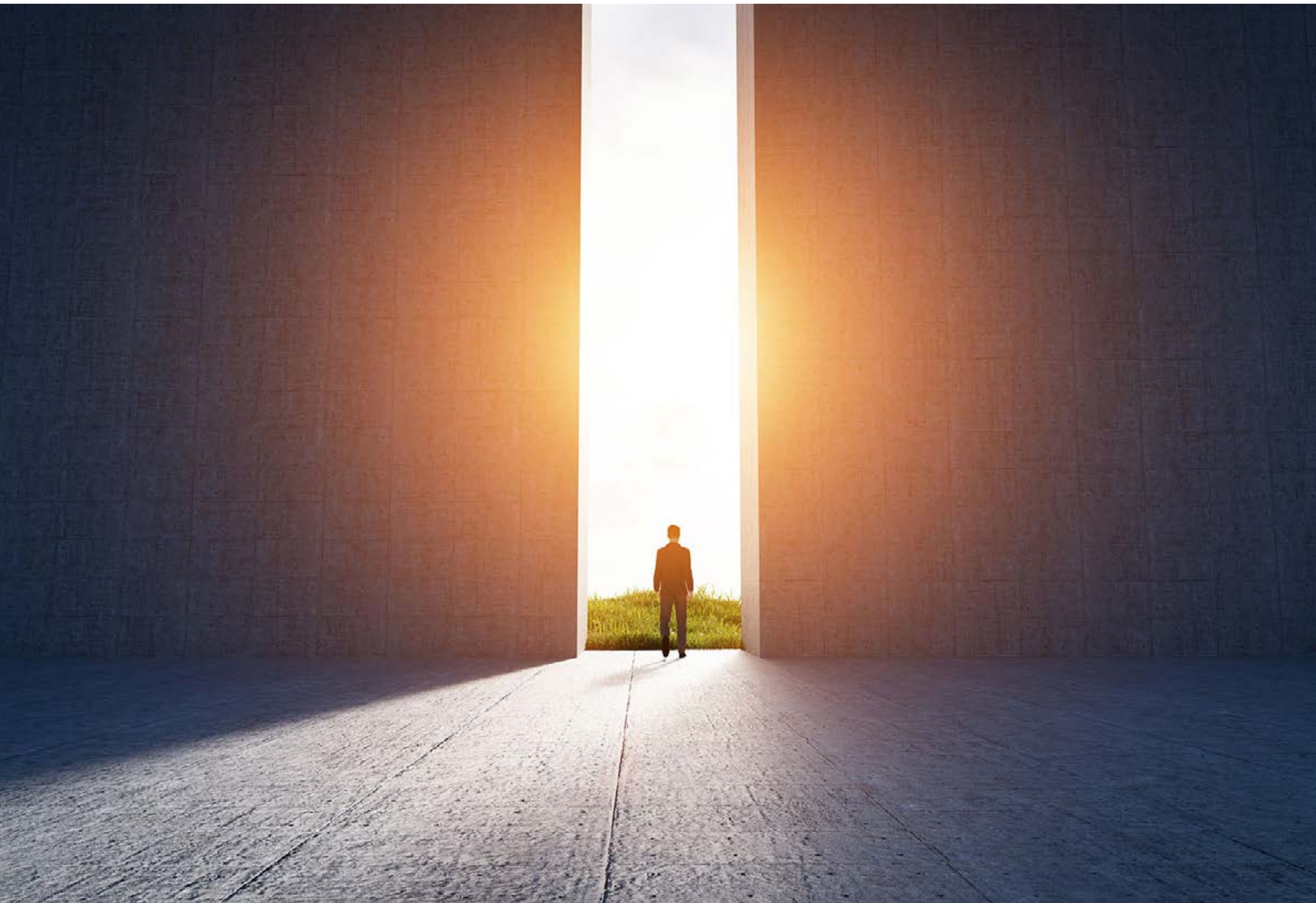
06

Tools and Methods for Inclusive Leadership in the Digital Age

01 BetaCodex

‘90% of what we call management are actually practices that keep back people from doing their work.’
Peter Drucker



Benefits

When is the BetaCodex useful?

- When you do not want to make decisions from the top down, e.g., from the management team.
- When you want customer needs to always take centre stage. This also applies to 'internal' customers.
- When you want to overcome petty conflicts or overlaps regarding competences.
- When you want internal processes to run more quickly, and changes to not be hindered by conflicts of interest.
- When you want everyone in the organisation to always have access to all relevant information.
- When you want the organisation to be able to react more quickly to both internal and external change.

From practice

One and a half years ago Marie accepted a managerial position at a printing business that also runs a copy shop in the town where it is located. Niklas, the founder, wanted to pave the way for his gradual departure from the operational management of the company after 15 challenging years of business development and the successful consolidation of the company. Marie and Niklas have agreed that Niklas - after a one-year period of initial training and coaching – will step down from managing the company and that Marie will be solely responsible for this role.

After twelve months, however, Niklas was not yet ready for the difficult step of handing over responsibility. He was unable to let go and therefore agreed on an interim solution with Marie: Marie would already lead the printing business by herself, and Niklas would continue to take care solely of matters relating to the copy shop for the time being. Marie, who had already noticed in the first 12 months of her role that things were not running smoothly at one or two points in the business, eventually went along with this approach – despite some reservations.

Marie's reservations were justified. It was often the case that the first reaction of her employees to any suggestion of change in the printing business, even though it was usually only a very small change that was being suggested, was: 'But we've always done it differently.' In addition to this, Niklas dropped by the printing business almost every other day to see whether everything was running well. Marie would then usually hear from an employee on the following day that Niklas was also opposed to the improvement that she had suggested. It became increasingly clear for Marie that things could not go on like this. There had to be a clearer division of roles and responsibilities, otherwise she could not do her job well.

Then came the corona crisis. Both areas of business were hit hard and had to close their doors for a time. Several of the employees had to reduce their working hours. Niklas was afraid that his life's work would not survive the crisis, and even Marie had no idea at first how to respond to the new situation. She didn't want to bury her head in the sand, and so in the first phase of lockdown she signed up for an online training course about new organisational models for small and medium-sized enterprises. The names of these models were completely new for her – none of the lecturers in her business management degree had ever said a word about them.

Marie found one of the lecturers, or rather one of the methods that the lecturer introduced, particularly interesting because it promised effective change. Effective solutions were exactly what Marie needed in the situation that she currently had to cope with in her company. The BetaCodex, the benefits of which the lecturer Claudia had been able to demonstrate in a very practical way, was an innovative approach to the topics of leadership and organisational development. Furthermore, there were already various success stories where the BetaCodex approach had worked very well in small enterprises and organisations.

Marie took advantage of the situation, got in touch with Claudia, and constructed a plan together with her for how to implement the BetaCodex approach in her company. They were both in agreement that Beta could be introduced in a single stroke and without a long period of preparation. They wanted to use the planned staff meeting in four weeks after the expected end of lockdown as their target date. In those four weeks Marie also persuaded Niklas that the time had come for a completely new culture of leadership and responsibility. Much to Marie's surprise and delight, Niklas was even happy that Marie saw light at the end of the tunnel where he himself had at times doubted.

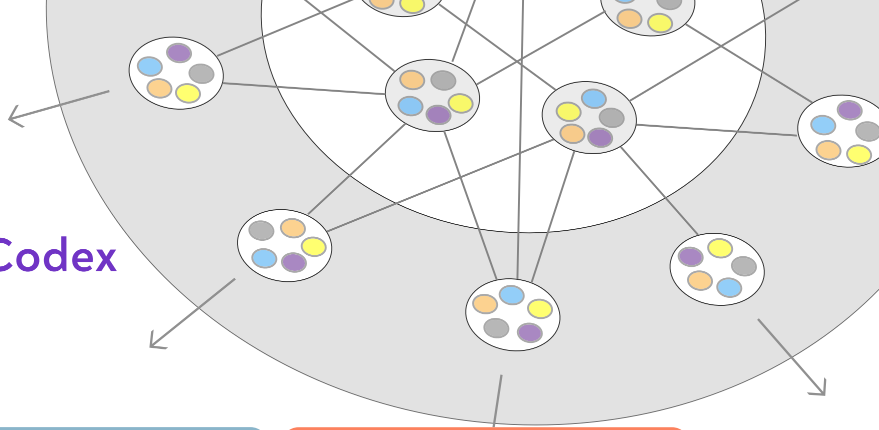
Today, one year after the legendary staff meeting at the end of lockdown, the employees are still talking about what happened on that day. It began with Niklas stepping down from managing the business with immediate effect. Marie then took over and, together with Claudia, explained to the stunned team how things would progress with Beta from the following day onwards. Many were thinking to themselves, 'Things can't get much worse now, so we may as well give it a go.' Today, the entire team can look back at 12 further challenging months in the pandemic, but no one had to be fired for financial reasons. If you were to ask the team now how they would assess the situation then there would be a continual stream of new suggestions for improvements. One thing is clear for everyone: no one would like to go back to the old struc-

In a nutshell

BetaCodex[1] is essentially less a tool than an attitude or a mindset. Beta can, however, become a decisive instrument in processes of change and when quickly restructuring an organisational structure because the Beta principles work like a compass. The BetaCodex consists of 12 principles that can be used to make it easier to arrive at decisions in complex situations. Beta is like a new language that all those involved in the practical work can pick up so that they can all act in unison in the future. The Beta principles allow a new organisational image to emerge that, amongst other things, emphasises shared responsibility rather than top-down instructions from the management team.

The BetaCodex is based on principles and not on rules. That is the decisive difference. Strict rules stipulate exactly what must be done. This may be an advantage in easy decision-making situations or in recurrent processes. However, as soon as a new challenge, such as digital transformation, arises for the leaders or for the entire organisation, then the 'rules' of bygone times are no longer of any help. They will usually even block the new start that is so desperately needed. The Beta principles, by contrast, can adapt to every new situation. They provide support and, at the same time, leave all the leeway that is required to react appropriately to a new situation. Beta is not a hammer that you only need to hit straight into the wood for everything to work out well. Beta is a new way for organisations to think and act, and thereby to make the best out of their individual potential.

[1] This tool description has been inspired by OpenSpace Beta. OpenSpace Beta is an open-source social technology that was published under the licence CC-BY-SA-4.0 and can be found at this link: www.OpenSpaceBeta.com. You can find further information about interesting resources in the 'Resources' section.



The Principles of the BetaCodex

Principles	Do this!	Not that!
01. Team autonomy	Connectedness with purpose	Not dependency
02. Federalisation	Integration into cells	Not division into silos
03. Leaderships	Self-organisation	Not management
04. All-around success	Comprehensive fitness	Not mono-maximisation
05. Transparency	Flow intelligence	Not power obstruction
06. Market orientation	Relative targets	Not top-down prescription
07. Conditional income	Participation	Not incentives
08. Presence of mind	Preparation	Not planned economy
09. Rhythm	Tact & groove	Not fiscal-year orientation
10. Mastery-based decision	Consequence	Not bureaucracy
11. Resource discipline	Expedience	Not status-orientation
12. Flow coordination	Value-creation dynamics	Not static allocations

INSTRUCTIONS

Alpha versus Beta – what is the difference?

If there is a BetaCodex, then what is Alpha? To put it simply, Alpha is almost everything that has been taught to date in business management degrees and what our current managers and leaders have used as their tool up until now.

The Alpha world is all about rules and laws. The principles of the Beta world stand in stark contrast to this. Fixed rules and laws are obviously justifiable, but they are cumbersome and of little use when facing something new or unfamiliar. In order to issue rules, you have to know or anticipate virtually all possible eventualities. Alpha is built on command and control. In both large and small Alpha organisations, it is the leadership team who make and are responsible for the decisions.

Principles, by contrast, can always be put to use. This also applies to new circumstances and challenges. This makes principles resilient to change. They can and must be interpreted against the background of new situations, and yet they provide orientation, especially in a rapidly changing environment. In addition to this, the Beta principles are better understood as a mindset. They do not offer a patented solution or an easy 'Yes' or 'No'. They cannot be used or implemented without careful thought, but they are like roadside crash barriers that help you to not come off the road. Furthermore, in a Beta organisation it is characteristic for decisions to be made by those who work as closely as possible with customers or with the target group.

What are the advantages of Beta? To begin with, our world today is far more complex than the world of the industrial age, for which Alpha was created. What worked well 100 years ago when mass producing cars on a conveyor belt will not invariably remain up to date in the knowledge-based society of the 21st century. In addition to this, Beta takes people seriously and does not simply reduce employees to means of production that can be treated or put to work like machines or raw materials. Beta companies value human qualities such as inventiveness, problem solving, motivation, social competences etc., and this will lead among other things to better products and services, and to more content customers. In the business world at the beginning of the 21st century, many traditionally-managed alpha organisations have already made their way into the beta world - mostly without knowing the concept but with considerable success.

The BetaCodex is based on over 20 years of practical experience and theoretical research. Its foundations can be traced back to a research project entitled 'Beyond Budgeting' that was carried out by the member organisations of the Beyond Budgeting Round Table (BBRT). The BetaCodex developed out of the BBRT is 2008 and the Beyond Budgeting organisational model was rebranded as the BetaCodex.

The following selection of terms provides a very good summary of what Beta fundamentally consists of: decentralised, adaptable, agile, ethical, oriented around people, empowering, enterprising, democratic, lean, driven by market forces, capable of complexity, sensitive and quick to react, unbureaucratic, connected.

Practical implementation – the Beta principles at a glance

Like all good principles designed to shape our actions, the Beta principles are easy to understand. Putting them into practice is, however, not quite as easy. This has less to do with the principles themselves than with the situations in which they come into effect. Organisations are not computers that require only a pre-programmed operating system for them to run smoothly from then on (not even our computers work like this!). Organisations or enterprises are complex social systems, and social systems work via communication. Only via communication. All strict rules and regulations are, by contrast, simply not complex enough. The Beta principles enable open communication that revolves around self-regulation. These principles do not, however, remove the need for those in responsibility to think, debate, argue or find good solutions.

In the first step you should look over all 12 of the BetaCodex principles at once. It works best if you note down the first thought that comes to mind on each of the 12 aspects when you think about your organisation. It may be that you are already partially working in Beta mode. In that case, your answer to one or several of the following questions would be 'Yes'

01. Do the teams in your organisation act **autonomously**, i.e., are their practices and forms of communication etc. set up in a way that facilitates independent work and allows them to assess their actions and decisions primarily in terms of your organisation's purpose – answering the question 'Why do we actually exist'?
02. Is there a **federal structure** in your organisation, i.e., are the individual teams or components of your organisation regularly exchanging information with each other and are not separated from each other by departmental boundaries?
03. Are you supporting **self-regulation** rather than top-down management that focuses on external regulation from a mindset of command and control?
04. Have you defined **success** as **creating value for your customers or your target group** rather than in terms of traditional figures such as growth, profit, turnover etc.?
05. Is **transparency** at the heart of your corporate philosophy? Can information flow as freely as possible rather than being 'locked away' behind the walls of separate departments as an instrument of power?
06. Do your activities revolve around **long-term market success**? This means, for example, that rather than focussing on your leadership team setting targets, the teams or employees working directly in contact with your customers make the most of the situations and opportunities that they come across in the market.
07. Are you focussing on genuine **participation** rather than rewarding the egoistic actions of individuals through individual incentives? Do you, for example, pay everyone a fair wage rather than letting individual sales representatives participate disproportionately in your success through sales bonuses? Of course, this does not mean paying everyone the same wage.

08. Are you in a position to always **react quickly** to (new) situations? To put it another way: are you thoroughly preparing yourself for potential opportunities and risks, rather than wanting to master the unforeseen by rolling out what you have always done?

09. Do you make **decisions or act in a way in a given situation that is best for you and your customers**, rather than checking whether your decision could have a negative impact on your tax situation or your quarterly figures?

10. In your organisation are decisions made by those who are best suited to doing so? In other words, is the prevailing mindset one of de-centralisation rather than corporate bureaucracy that always wants to have the last word, even when it understands least about a situation?

11. Are you implementing **your resources for the right purposes**? One sign that you are not doing that is when departmental leaders manage budgets that they primarily defend against the involvement of others in order to preserve their status or power.

12. Does everything in your company revolve around **creating value for your customers and your target group**? If you are doing this, then you can do without setting targets and determining budget figures.

Practical implementation – how do I get from Alpha to Beta?

Have a look at how often you could answer 'Yes'. The fewer positive answers you have, the more you are (for the moment) still in Alpha mode. You may think that this approach is exactly what got you where you are today and is the clear foundation of your success. It is absolutely true that most Alpha companies are, in the traditional sense of the word, successful. With Beta is can get even better, however, and you will soon be looking back on the successes of your Alpha time and thinking: 'What a shame that we didn't implement Beta even earlier. Things would have been even better then.'

In addition to this, in the age of the digital revolution the traditional Alpha approach will not carry you forward in your search for new solutions, products and services. Simply 'doing what we've always done' is really just a step backwards – each day that you change nothing. Alpha companies are the ones who, one hundred years ago, bred faster horses to pull carriages rather than changing to producing cars. This was not a good idea back then, and it certainly is not a good idea today.

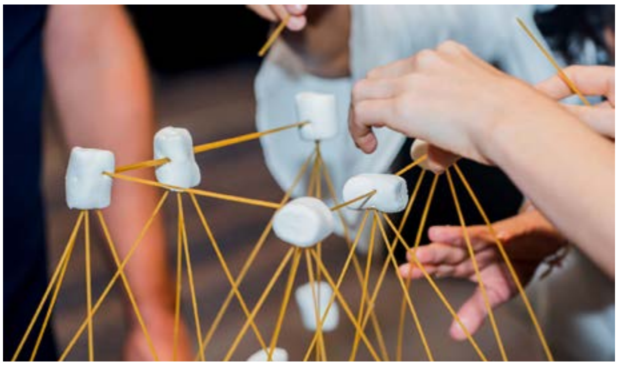
In the second step we will have another look at the 12 Beta principles in more detail. The following explanations and examples will help to give you a further insight into how Beta can work in your organisation. It works best if you use this step again to work specifically on the challenges facing your organisation. Have a think about whether there is an idea, an activity, or an approach etc. that you would like to introduce or implement in your company and that also fits with one of the 12 Beta principles. It works best if you think about a possible activity for each of the 12 principles and note down what positive change you believe it would bring about.

1. Allow more Autonomy

If the autonomy of each individual and team is increased, then these will be able to respond more independently and appropriately to signals from, for example, your customers. By contrast, those who are focussed only on their careers will rely on the favour of their superiors and will simply 'tell them what they want to hear' instead of developing innovative ideas that revolve around customer requirements.

2. Support federalisation

Departmental egoism and silo structures can be overcome if small, authorised, and cross-functional teams straddle departments and orient themselves around the needs of their customers. Those who support federalisation will make a decisive impact towards better collating and using important knowledgewithin the organisation.



3. Make self-organisation possible

Individual employees and teams will shoulder more responsibility if you forego micromanagement and top-down demands. The decision-making process will become more inclusive. There is a good chance that fewer wrong decisions will be made by overstretched leaders and the entire decision-making process will be accelerated. This will allow the organisation to react more quickly to the requirements of the market and to changing parameters.

4. Set up alternative measurements of success

If you stop focussing on growth, market power and maximising profit, and start paying attention to what fits the internal culture of your organisation and to creating values that are important in terms of your customers, then you can expect success that goes beyond the one-dimensional performance figures. One positive side effect is that, alongside all this, the classic company metrics mentioned above will also improve

5. Create transparency and share information

When all necessary information is available to people and teams that can make decisions de-centrally and autonomously, then more economically viable and intelligent decisions can be made. In the hierarchically led structures this means that you as a leader must forego power. You will be rewarded, however, in that your own workload will be reduced. In addition to this, you will no longer make poor decisions that have mostly remained unquestioned for far too long in a hierarchical world. This is only possible because the leadership teams in top-down organisations are usually not given honest feedback.

6. Find sensible long-term goals

Once you forego the stipulation and extensive measurement of short-term goals or key performance indicators (KPI), then space will emerge for you to get up to speed with the demands of a living and complex environment that cannot easily be planned. Sensible and long-term goals enable flexible reactions and offer more room to manoeuvre. It could be something like this: our products and services should be significantly better in five years than they are today, we want to use this to generate more income, so that our entire body of staff from cleaners to CEOs will earn a greater net amount.

7. Enable another participation in success

WOnce individual performance assessments or incentives such as bonus systems have been abolished, other models will take their place that allow all employees in an organisation to be genuinely involved in its success. Sufficient income is just one, albeit important, dimension of this participation. Added to this is the fact that incentive schemes, e.g., sales commission for individual employees, undermine the willingness to cooperate within an organisation and can lead to customers not being offered the best product

8. Plan less in order to be more agile and faster

Once you stop constantly planning every little detail, you will be able to use the time you save to be more alert and to react your constantly changing environment. Agility, flexibility, and speed are necessary if you are to react appropriately to new conditions. The worldwide corona pandemic has shown, for example, which organisations and companies were able to adapt to a new state of play within a short space of time. The corona shock even made some companies stronger.

9. Don't orient yourself around the fiscal year

Once you uncouple decisions from the fiscal year or from quarterly goals, amongst other things it will mean goodbye to December fever! You will never again have to throw money away at the end of the year. The pace of work in an organisation and the supply of necessary resources has little to do with which period our national tax administration deems appropriate for determining our tax liability. Organisations work more like interval training: several short sprints are interspersed with phases of analysis and assessment in order to make significant progress in a suitable timeframe. Self-organised teams should decide themselves how much time is required for this

10. Abolish bureaucracy and allow experts to do their work

Once you have abolished as many rigid rules and reporting obligations as possible, you will no longer be constantly chasing the real demands of the market or your customers. The 'top' and 'bottom' of an organisation will disappear when decisions are consistently made in an unbureaucratic and decentralised way by individuals or teams who are best qualified on the basis of their expertise.

11. Distribute resources differently

If you want decisions to become decentralised, then you will have to equip the decentralised units with the necessary resources. This is the only way for them to receive the autonomy that will enable them to act. There is no room in this system for those who love their own status or for departmental egoism. This is something that inclusive leaders will need to accept.

12. Let reality play its part

Once you have abandoned the centralised and static distribution of resources and responsibility, our often rapidly changing environment will have the opportunity to exert more of an influence on your internal decisions. In the place of a central planned economy in a company, a flow will emerge that creates more value for the customers and at the same time generates higher profits for the organisation.

With this Beta mindset inclusive leaders will be able to act in keeping with the times. A clear and binding set of 12 principles will make it possible for you to navigate your organisation or company through digital transformation.

DAY-TO-DAY SUPPORT

It is not like a buffet – you cannot just choose the principles that you like

The 12 Beta principles do not function like a menu from which you can choose what you enjoy most. The 12 principles mutually complement each other and reach their full effectiveness in their totality. Lennart Francke, the former CFO of Svenska commercial bank, a company that already worked early on with the precursor of the BetaCodex, gave the following answer to the question of whether this organisational model could only be partially applied: 'Imagine Great Britain would change from left-side traffic flow to right-side traffic as practiced on the European continent. And imagine that the British people might say: 'Okay, but to us, the British, that appears way too radical and too complex to be done in a rush. Let´s therefore start next week with the buses and the trucks only.' That would not work, and it is just the same with the BetaCodex.' [2]

Learning, practicing, and speaking the new Beta language

If you want to learn a new language, then you will not be able to converse perfectly in it after just one month. You learn Beta like a new language, and there will be those in your organisation who find it easier and those who need to 'practice' more. The best way to learn a new language is through real experience by putting it into practice. To put it another way: practice makes perfect.

[2] Quelle: https://betacodex.org/about/laws/.

To make the learning process easier you can hang up the 12 Beta principles at your workplace, for example, or at another central location in your organisation. This works like a cheat sheet that helps everyone to remember them. It is best if you think about further teaching aids that would fit your organisational culture. If you think carefully about choosing or developing your specific Beta teaching aids in a way that also conforms to the Beta principles that you are already absolutely on the right path

Introducing Beta – what will help me with the implementation?

There is an organisational approach that builds directly on the BetaCodex and that you can use to introduce Beta into your organisation: cell structure design. If you spend some time dealing with this approach, then you will have some idea of how your organisation could look after introducing Beta. Suffice it to say: instead of an organisational chart that depicts hierarchical relationships in your organisation, your organisation's profile will be more reminiscent of a piece of fruit with seeds and a skin. Just like an apple or a peach. Interested? You can also find information about the topic of cell structure design in this chapter.

RESOURCES

The BetaCodex is supported and developed internationally by the BetaCodex network. The network's website is a very profitable source for further information: https://betacodex.org/.

The following publications provide a good introduction to the beta world and beyond:

Hermann, Silke; Pfläging, Nils (2018): Open Space Beta; BetaCodex Publishing.

Pfläging, Nils (2020): Essays on Beta, Vol. 1: What´s now & next in organizational leadership, transformation and learning; BetaCodex Publishing.

Case Study: '11 Days to a New Organization with the Beta Codex – Case Study of the Restructuring of IDEAL-Werk': https://eurac.com/11-days-new-organization-beta-codex/

#betacodex #principles #mindset #self-organisation

#added value #transparency #participation #cell structure design #agile

02 Open Space for Leaders

'Take it slow when you're in a rush!'
Japanese saying

Benefits

When is Open Space especially useful for leaders?

- When you have to solve an urgent and complex problem that is of interest to you.
- When you want to redefine your leadership style to meet the challenges of the future better.
- When you believe that you or your organisation respond to challenges too slowly.
- When you believe that you cannot keep doing things the way they have been done in the past, in other words you know that you need to fundamentally change something in yourself or in your organisation.

From practice

Simone is a partner in a notary and legal association in Hamburg. Over the past few years, she has more or less at random had some contact with new technologies such as artificial intelligence (AI) or blockchain. Usually, it is when the media has reported about it. Until now she has not spent much time looking in more depth into this subject. Her daily work is very intense. Clients expect quick replies, which leaves little time to look into these new technologies. She recently found out that new digital developments such as blockchain, for example, offer much more than just the basis for cryptocurrencies. This technology could even lead to notaries becoming obsolete in the future. For Simone this means that she now needs to deal with these and other topics as soon as possible.

A second 'building site' in her company is the fact that her employees, from trainees to paralegals to junior consultants, are all shouldering too little responsibility in her opinion. She sometimes feels as if the saying is true of them: ''Someone' is always doing something wrong, but it never happens to be 'anyone'.' She is no longer content with the way that everyone expects her to provide directions and solutions, and that she is the one who has to jump in when things get urgent. And then the Covid pandemic hit on top of all this. Ever since then the 'hamster wheel' has been turning even faster for Simone and the balancing act between her challenges at home as mother of two schoolchildren and the challenges in the legal association has been the cause of constant overload for the last six months.

It is at this point that Simone takes part in the EU project INCLUDE as a tester and discovers how she can use the Open Space method to create the necessary free space for her as a leader to think in peace and with a healthy distance about her leadership situation and her responsibility for her company in the age of digital transformation.

She decides to use the new INCLUDE Open Space tool for leaders. After reading through the necessary basic information, she is able to nail down a topic for her two-day retreat, which she spends on her favourite island in the North Sea. This topic is especially important at the moment: 'My role in our company 2.0 – How would I like to work in the future?'

Once Simone has returned from her personal Open Space retreat, she tests, among other things, new possibilities of collaborative working and decision-making in her team, one step at a time. While doing this she sometimes wonders why these methods have not already been shared with her children at primary school. It is incredible to see what tools are available for her personally to improve her day-to-day work as a leader. They just have to be discovered. Her solo Open Space gave her the basis for this. On the basis of these experiences she started off a process of organisational development in her company and was able to slowly convince the other partners in the association too that they should move in this direction. One of the most interesting results of this process is her company's collaboration in a European research consortium that is financed by funding from the Horizon Europe programme. Together with other companies, a professional chamber and especially a few highly specialised researchers from Europe's top universities, Simone is currently working on the development of a new blockchain app that will further develop the applications of Ethereum blockchain that are already popular across the world.

In a nutshell

Open Space for leaders is the right method in the following situations:

- If you really do want to start implementing your results.
- If the Open Space retreat is not primarily planned as a motivational event for yourself.
- If the Open Space is not only designed to convince yourself of measures, predefined goals or strategies that are already fixed.
- If it is not 'only' about researching information or gleaning new knowledge.
- If there are no foundational or serious conflicts in an organisation. Open Space is able to deal with conflicts, but it is not a method of mediation e.g., for members of a leadership team that disagree with one another.
- If it is not obvious to you what needs to happen next and what the best solution for the problem is.

Open Space for leaders takes the advantages of the Open Space method, that was originally designed for larger groups, and opens them up for individuals or small leadership teams to enable them to have better solo or team retreats. The approach is always well suited for times when you as an individual or your organisation is faced with a complex challenge, for example if you want to develop your style of leadership or if something fundamental has to be changed or developed in your organisation. Open Space for leaders combines the power of focussed individual work with the openness and agility of the Open Space methods for organisations. In its traditional area of application, Open Space has led to numerous deep-seated changes and developments across the globe. You have to first read in detail the Open Space approach for organisations before you conduct a personal retreat with the principles of Open Space (cf. tool 'Open Space for Organisations').That will also help you to decide whether this approach could be useful not just for you as an individual but also for the development of your organisation – because for real change you need to win as many fellow fighters in your organisation as possible.

Mindset for an Open Space retreat

‘You are the only one that counts!’

‘Whatever happens is the only thing that could have happened’

‘It will start when the time is right’

‘When it’s over, it’s over. When it isn’t over, it isn’t over.’

‘Keep your eyes open and expect to be surprised!’

INSTRUCTIONS

Foundations

There are a few things required for Open Space to also work for individuals or small teams. That also means that if the following aspects do not apply, then you should carefully consider whether Open Space really is the right approach for you.

Understand Open Space for organisations

Start by reading the information that we have compiled for you in the tool ‘Open Space for Organisations’. This is important if you are to understand the mindset that is required more generally for the Open Space approach. You can adapt this mindset for use as an individual or in a small circle of two, three, four etc.

Important topic

The topic for your retreat in Open Space is of crucial importance. You should have an important and exciting question or a foundational and complex challenge at the centre. Make sure that you formulate your topic clearly without narrowing it too much. This will allow you to leave enough room to consider the topic from as many perspectives as possible.

As many different points of view as possible

You will be alone with your topic during the open space retreat or approaching it with few people. It is therefore all the more important that you discover and activate all of the diversity hidden inside you. You will be able to achieve this more easily, for example, if you do not only consider your topic or separate aspects of your topic from your own perspective in your organisation. Try to consciously and systematically approach your question from other viewpoints too, for example from that of your greatest supporter or even from that of your company's most important critic. You will also gain new and important angles if you consider your topic from the perspective of other roles that you fill in your life outside of your position as a leader. What does the (marriage) partner in you think? What about the basketball coach for the youth team? What thoughts and ideas come to you when you, for example, put on your 'parent hat'? Does anything change? Alongside a change of role, the different talents that are dormant inside you can help to bring greater clarity. Set yourself the task, for example, of drawing up the facts or creating a collage about a certain topic. Turn your notes into a short rhyming poem or think about how you could develop it into a game.

Voluntariness

Just like its equivalent with lots of participants, your personal Open Space will only work if you really want it. You are the only one who can decide whether this way of working is right for you. Consciously examine this in advance. It is better to find a new appointment if you are uncertain on the day that you meant to begin whether it really is the right thing for you today.

Unknown solution

Your topic is not suitable for an Open Space retreat if it is completely obvious to you or even to others in your organisation what should happen, and there is, for example, only one sensible solution. In these situations, Open Space is a waste of time, regardless of whether it is done alone, with a few people, or with several people.

(Inner) conflicts are likely

It is a good sign if different, sometimes even diametrically opposed arguments, rise up in response to the topic. There is usually no other way with complex topics. This is a good prerequisite for a productive retreat. If you would like, for example, to analyse your behaviour in different situations, then some of the tools that we have specially collated for the self-reflection of leaders in section 5 'At a glance: INCLUDE tools and methods' will help you

It is urgent

The best topics are those where you know that you ought to have tackled them long ago. The more a topic is a burning issue for you, the greater your chances of a productive process of work that is focussed on a solution.

An attractive and peaceful place

Find an attractive and quietly situated location for your retreat. It does not have to be a cloister, but a cloister is a good image for your orientation. It is important that there are few to no disruptions and that you are able to work in peace and to manage yourself at your own tempo. You will divide your retreat's main topic into various sub-topics. If you are able, it is a good idea to deal with each of these separate subtopics in a different place, for example. Feel free to deliberately keep changing your location. Lots of things are easier to think through when you are moving. A walk with a mobile phone as a dictation device is also a workspace. Make sure, however, that your phone has been deactivated from any calls or distracting messages during this time.

Enough time

For foundational topics you should take at least two days out of your normal working routine. This is the only way for you to have enough time for comprehensive reflection and you will be able to plan your next practical steps that you would like to implement in peace when you are back at your workplace. Undisturbed time on the retreat is almost as important as the length of time. For your own peace of mind you can specify a contact person nearby, for example at the reception of your hotel, who can reach you in emergencies. You should only allow yourself to be disturbed when there is no alternative. Perhaps even more important: do not read any emails etc. during your retreat, not even in the evening when you have finished your

programme for the day

Roles

When conducting Open Space in larger groups we distinguish between four different roles: organiser or sponsor, facilitator, participants and initiators of individual topic sessions. You can also assume these roles as an individual or divide them between two or more people if you are working as a small team.

As organiser or sponsor you are assuming the role of an initiator and planner for your own event. As a facilitator you are 'guiding' yourself through the process of work and the different phases of your Open Space retreat and making sure that the rules for productive work are kept. First and foremost, however, you are a participant and therefore the main player. You get to decide yourself what you would like to deal with and when and how to do this. No one will be monitoring you. In your topic sessions that you use to focus in more detail on the individual aspects of your main topic it is important that you document your thoughts, ideas and results so that you can come back to them later.

Implementation/Procedure

Prepare your Open Space retreat well. It is then very likely that you will have a really productive time that is also relaxed.

Preparation (planning or planning meeting)

If you are going to be alone in the retreat then the planning and preparation is entirely your responsibility. If you are a small (leadership) team then you should plan your retreat together. The most important thing is that you find a good and exciting topic. You should determine the topic at least four weeks before the date set for your retreat. One pleasant side effect of determining the topic this early is that you will already begin to subconsciously 'work' on the topic. You will also be able to think again in peace about whether the topic has been correctly chosen and defined. Feel free to undertake changes if it is appropriate.

Invitation to yourself

It might seem quite strange to you, but you should write out a 'proper' invitation to yourself and send it, for example, to your email address. This will undermine the relevance of your planned Open Space retreat and will also make the start of the work easier at the retreat. This 'invitation to myself' is quick to write. The following content should be taken into account:

- A greeting that explains why you want to do your Open Space retreat.
- The challenges that you personally would like to address, or that you need to tackle in your company or organisation. You could, for example, explain in more detail in which areas there are currently problems that need to be solved, e.g. 'I have noticed that the increased work from home office has made the communication suffer in the company and led to increased mistakes and miscommunications. I should start there and think about what I can change and how we can further develop our internal processes of communication to sort out this situation.'
- Location and date when your retreat will occur.

Open Space retreat

When implementing an Open Space retreat, it is possible to distinguish between the same phases that should be run through when working with larger groups:

- **Opening:** find an attractive, peaceful and well-suited location for the start where you can easily lay out materials such as a computer for research, paper, pinboards and pens. It is good if you can also safely leave these items unattended here. Take a short time to relax and read your invitation text out loud that you wrote to yourself in advance. This will clearly define the topic for your retreat. You should then once again take a clear look as the Open Space procedure. Read both of the texts about Open Space for organisations and Open Space for leaders in this handbook carefully again. This can take 20 to 30 minutes. It is important that you are clear on the mindset with which you want to approach the upcoming hours or days, and on which principles will help you to have a particularly productive time.
- **Setting the agenda:** you have settled on an important topic, but it is not yet clear how exactly you will work or approach this during your retreat. It may be that this uncertainty has unsettled you on your journey in or that you woke up that morning with an uneasy feeling because you are not yet sure what exactly you will be doing. One thing is clear: you need a timetable or an agenda that structures your work. Set aside specific windows of time of around 45 to 60 minutes for each of the individual phases of work. Depending on your energy, on a two-day retreat you should be able to complete around eight to ten phases of work across the two days. Now is the time to collect your specific ideas, concerns, questions or interests. Your guiding principle for this will be the main topic of your retreat. Carry out a brainstorming session and note down all of the aspects that you can think of relating to your key question on

different notecards that you can place on a pinboard. You can then build on this by arranging the different aspects into clusters that suit you for a single phase of work and that together form interesting processes of discovery. Think about how you would like to structure your different topics in terms of time. At the end of the process you should have compiled an agenda that will serve as the starting point for your later work. Make sure that the individual topics for the phases of work are phrased as precisely as possible. To this end it can be helpful to phrase the individual topics as open questions

- **Marketplace:** now take a short break and go somewhere else for at least 10 minutes, e.g. to drink a coffee in peace and quiet. Then return to your agenda and start the marketplace phase. Take time to calmly look over your agenda once again and have a think whether you could have forgotten anything. Should some topics be fused after all? Or is any topic so broad that it would provide enough material for two phases of work? Change, expand, or delete things as it seems best to you at that moment. In the marketplace phase you are 'negotiating' with yourself to see if you are initially happy with your working agenda. During the course of your retreat the agenda wall will become somewhere that you will ideally keep coming back to after each individual session to see what topic is waiting for you next. If you think that you should make changes to your approach, then you have the option of further modifying or optimising the structure or content. Just remember: you are solely responsible for the process and success of your retreat.
- **Open Space work sessions:** from now on you will spend the majority of your time during the Open Space retreat on the individual topic sessions that you have planned in your agenda. It is important

to keep choosing different places to work that will inspire you. Now is also the time to deliberately include viewpoints from different people on a question or to consider the question from the perspective of one of your roles, e.g. how you feel as an ordinary citizen and not as a leader. The way you progress is left up to your imagination and also depends on your specific question. Use any means that seem appropriate to you, e.g. you could try ring someone that you have always wanted to talk to about this topic, or chat with them online. An Open Space retreat does not mean that you cannot or even should not involve the outside world when necessary. It is important that you note down all important thoughts, information, ideas, plans etc. in writing on a documentation sheet before ending a session. You can do this by hand or on your computer. The main thing is that you are able to refer back to it later.

- **Breaks:** Open Space arose out of the observation that the really interesting conversations at most conferences almost always took place in the breaks. This is when people can move around freely and talk with those around them about the things that really interest them. The free space that is created in Open Space has the aim of placing this 'break experience' at the very heart of the entire event. You can also apply this simple insight to your retreat. Make sure that you are well stocked and take a break whenever you need it. You may find other people at the place you are staying that you can chat with. It is important that you step back from the topic of your retreat at any point when it seems right to you. It is counterproductive for you, for example, to have fixed mealtimes at the place that you are staying.

- **Results and plan of action:** Nach once all of the topical sessions are over you will return to the place where you created the agenda at the beginning. You now have a phase for reflection, during which time you can read over your documentation again at your own pace. It works best if the documentation has been printed out and is in front of you. During this 'reading phase' you will once again recall what you have worked through. You have the option of adding further comments, ideas etc. to all of the documentation sheets. After the reading phase you should go on a short walk or relax and drink a coffee, just like in the agenda setting phase. You will then start on your plan of action. This is all about your plans, ideas, projects etc. that you want to get started after your retreat is over. This is all about you: on the basis of the insights that you have gleaned during your Open Space retreat, what would you like to specifically tackle, deepen, practice or test etc. in the next 45 days? Write down all of your impulses and specific plans on separate planning documents. Each activity should have a meaningful title and you should describe exactly what you intend to do in 500 to 1000 characters. Once you have collected all of the activities that you would like to tackle, read each of the documents through

again and make changes as you see fit. Finish by making your planning practical with specific deadlines etc. that you set in line with the SMART methodology. **SMART** goals have five qualities: they are **s**pecific, **m**easurable, **a**ttainable, **r**elevant and **t**ime-based.

- **Completion:** at the end of your Open Space retreat, your personal insights, experiences, and realisations are in the limelight. The content of the work is behind you. You have planned how you would like to proceed from tomorrow onwards. One effective way to preserve the feelings and atmosphere of that moment is to write a letter to yourself that summarises in writing your current thoughts about the Open Space retreat you have just experienced and the results you have achieved. Seal the letter with a nice stamp and put it in the post. Do not open the letter until 45 days have elapsed so that you already have implemented a large part of the planned activities. Your Open Space retreat is over when you have sealed the envelope.
- **Optional:** morning and evening reflection, 'celebration': for Open Space retreats that last several days you can include a short time for reflection each morning and evening to add new session ideas, for example. Should any important insights come to you beyond the specific work on your retreat topics, then use the reflection phases to document these. Once your Open Space retreat is over, it's time to 'celebrate'. Treat yourself to something different, if possible extend your stay for an extra day of holiday. Do something that you will later look back on with enjoyment

Structure

In order for an Open Space retreat to work, you should focus your behaviour on the following four principles, one 'Law', two so-called phenomena, and one important exhortation.

The four principles are

- **'You are the only one that counts':** It does not matter if other people would have been able to make important contributions. During the Open Space retreat your focus in only on yourself.
- **'Whatever happens is the only thing that could have happened':** It does not matter what could, should, or ought to have happened. Only what actually did happen is important and that is what you will concentrate on.
- **'It will start when the time is right':** Innovations, ideas and creativity do not go by the clock. You generally cannot plan something new. You have to 'discover' it. This requires patience and perseverance. Go with the flow, even if you do not have any earth-shattering ideas for a longer period of time.
- **'When it's over, it's over. When it isn't over, it isn't over':** You are personally responsible for your time in the Open Space. If, for example, everything has already been researched, written down and thought through after 20 minutes, then you can end this session. The reverse is also true: if 60 minutes have gone by and a topic is just starting to get really interesting, then there is no reason why you should not keep going with the work.

The 'law of two feet' is the most important basis for action in any Open Space. It states: 'if you ever find yourself in a situation during the Open Space where you cannot learn or contribute anything, then use your two feet and go somewhere that is better for you.' In an Open Space retreat you will not be able to 'run away' from yourself, but you will notice if you are not getting anywhere in a particular situation when you are not learning anything new or having any new and helpful thoughts about an issue. This is when you focus on a different task or the next task

Two 'phenomena':

- **'Bumblebees':** 'bumblebees' will emerge in Open Space with lots of participants if they have taken the 'law of two feet' to heart. Participants will freely move to and fro between the separate work groups. Just like their nickname in nature, they are fulfilling an important function by doing this: they are cross-pollinating different groups with their insights, questions or ideas. You can also do this when you are alone by ending a work session where you are not making any progress and moving on to the topic on the agenda that appeals to you most at that moment. It may be that you will suddenly see the importance again of the content from the phase of work that you had previously planned to do when you view it from a different angle. This is one way for you to 'cross-pollinate' your own work.
- **'Butterflies':** these little Open Space 'animals' are like their natural role models. They are pretty. To be pretty you do not have to do much. In Open Space, 'butterflies' are people who do not know precisely where they should be, or who simply want to stay put in a non-organised place for a while. You can find them at the buffet or outside by the door in the sun. As they do this, they open up space for unplanned discussions and new insights

that, in hindsight, may go on to influence the course of the entire event. This is why 'butterflies' are important. System theory has a name for them, although it is not quite as pretty as 'butterflies': centres of inactivity. If you feel like it, then simply be your own 'butterfly'. World-changing ideas have come to people that have simply watched apples falling from trees. These are the moments to shout out 'Eureka!'

An **'exhortation'**: **'Keep your eyes open and expect to be surprised!'** This exhortation should remind us that we will have little space for something new if we go into the Open Space with preconceived, unchangeable opinions or concepts. For the duration of the Open Space simply leave your old truths at home. There will then be space for surprising insights and ideas.

DAY-TO-DAY SUPPORT

You are your own facilitator

Open Space is simple but not easy. This is a sentence that you will often hear, especially from experienced Open Space guides. This is also true for the solo variation or if you are only a small group of people. At its heart it is all about making sure that you keep the Open Space mindset in view at all times, consisting in the four principles, the 'law', the two phenomena and the exhortation. Carry these seven points around with you and remind yourself of them from time to time. This will help you to not cheat yourself and fall back into ways of working that have no place in the Open Space. Whenever your inner voice says, 'You must!' it is high time to take out your Open Space mindset again.

Your Open Space retreat lives on the intentional tension between self-organised openness on the one hand, and the aspiration to advance in a focussed way a specific topic that is very important, perhaps even of existential importance, for you or your organisation. You need to be able to cope with this tension and you should not lose your nerves when you 'catch yourself' doing nothing during your retreat or feel a certain uncomfortableness. Your thoughts will most likely oscillate between two extremes poles. In one moment you will think: 'Great that I now have the time to deal with such an exciting topic at my own pace'. In the next moment you will be asking yourself: 'What am I actually doing here? I'm not making any progress.' This is the time to let some steam out and reduce your expectations for yourself. The tension between freedom and goal-oriented focus is otherwise healthy and good.

When is Open Space not suitable for leaders?

An Open Space retreat is not the right method in the following situations:

- If you do not really want to start implementing your results.
- If you primarily want to do the Open Space retreat as a motivational event for yourself.
- If predefined goals and strategies are already all lined up and the Open Space is only designed to convince you of these measures.
- If it is 'only' about researching information or gleaning new knowledge.
- If there are foundational or serious conflicts in an organisation. Open Space is able to deal with conflicts, but it is not a method of mediation, e.g. for members of

a leadership team that disagree with one another.

- If it is obvious to you what needs to happen next and what the best solution for the problem is. Or to put it another way, in situations like this: 'When the tap is dripping, we call the plumber.'

In what cases is Open Space particularly well suited?

Open Space is particularly well suited to complex situations. This is especially true if you would like to initiate a process of personal development or a process of organisational development. The solo Open Space format is equally well-suited if you would like to plan different steps of implementation, e.g. for your personal development or the development of your company.

Keep it simple, stupid!

In general, it is important to focus on what is essential. You will need a suitable room, enough time without disruptions, an exciting topic and good refreshments. Everything else will take care of itself. You do not need much technology. It is enough if you have a computer for research and documentation, and the option of printing out your documentation. You may also want some books that are relevant to the topic and seem inspirational.

Can you use Open Space in your day-to-day work?

If you have experimented with both the Open Space method for groups and with the solo approach for a while, then you should think about whether you will integrate the Open Space principles into your normal day-to-day work. Open Space is possible every day. It is your responsibility to put the Open Space mindset into practice in your daily routines. If you as a leadership team are convinced of the methodology then it is relatively easy to carry out important meetings, e.g. for adapting your strategy, in line with the Open Space principles. Be bold enough to try it out. You can be sure that there will be surprises!

RESOURCES

Open Space was 'discovered' by Harrison Owen. The procedure is freely available.

The Open Space method for leaders and small groups represents an adaptation of the classical Open Space method. It was developed and tested during the INCLUDE project.

You can find a short introduction from Harrison Owen here: 'A Brief User's Guide to Open Space Technology'. This text also includes a good example of an opening speech that an Open Space facilitator could use at the start of the event to explain the Open Space format: (https://openspaceworld.org/wp2/hho/papers/brief-users-guide-open-space-technology/).

Internet resources on Open Space: https://openspaceworld.org/wp2/

Owen, Harrison (2012): Open Space Technology. A User´s Guide; Third Edition; Berret-Koehler.

Mezick, Daniel et al. (2015): The Open Space Agility Handbook; New Technology Solutions.

Video: Open Space Technology - The most engaging all-company meeting:
https://www.youtube.com/watch?v=WQj12jmLGr4

#open space #self-organisation #agility #innovation

03 Life Positions

‘External circumstances are not what govern life.
It is rather internal changes that project
themselves outward.’
Wilma Thomalla

Benefits

When is the life position tool useful?

→ When you want greater satisfaction from working with others.

→ When you want to be more courageous in difficult conversations where you are faced with different opinions.

→ When you want to find a way out of dead-end situations.

→ When you want to have a team based on healthy relationships and emotional security, which is a necessary foundation for developing and creating innovation.

→ When you want to create healthy rules for the team to help those who are excluded or who are simply propped up rather than being helped, allowing them to thrive.

→ When you want to get your team members to use their full decision-making power and influence.

→ When you want to stimulate creativity in your team by increasing your confidence that methods other than your own can also be effective.

From practice

Tom is the CEO of a small company. During leadership meetings, he asks others for their opinions, quietly listens to their solutions, and finally rejects each of their ideas. He does this by asking several insightful questions which, in Tom's own mind, prove how the others' ideas don't make sense. He does not present his own solutions, however, nor does he make any decisions. Although the topics of the meetings are different each time, this pattern is often repeated. Everyone, including Tom, feels drained and low on energy.

Tom is frustrated because he thinks he has a demotivated team and is working with the wrong people. He takes various measures to restructure the team. It is not long before Tom believes that the new employees are simply not well qualified enough for him to be able to trust them. He is sometimes surprised to see former employees being successful in their work with his competitors. This confirms his belief in his uniqueness and in his high standards at work. Whilst his competitors are content with mediocracy, only truly exceptional people can be successful when working for him. The truth is that he cannot trust anyone. Meanwhile, the company drifts away and loses its competitive edge.

Regardless of what Tom does or says to his team members, he takes the position 'I am OK – you are not OK'. He expresses this with his words, his behaviour, and his emotional reactions. With these kinds of hidden or open assumptions about himself and others it is impossible to reach constructive solutions together or to encourage the motivation and inspiration in the team that would lead the company out of its crisis.

In a nutshell

When you meet others, you can think of yourself as being OK or as not being OK. You can think the same about others.

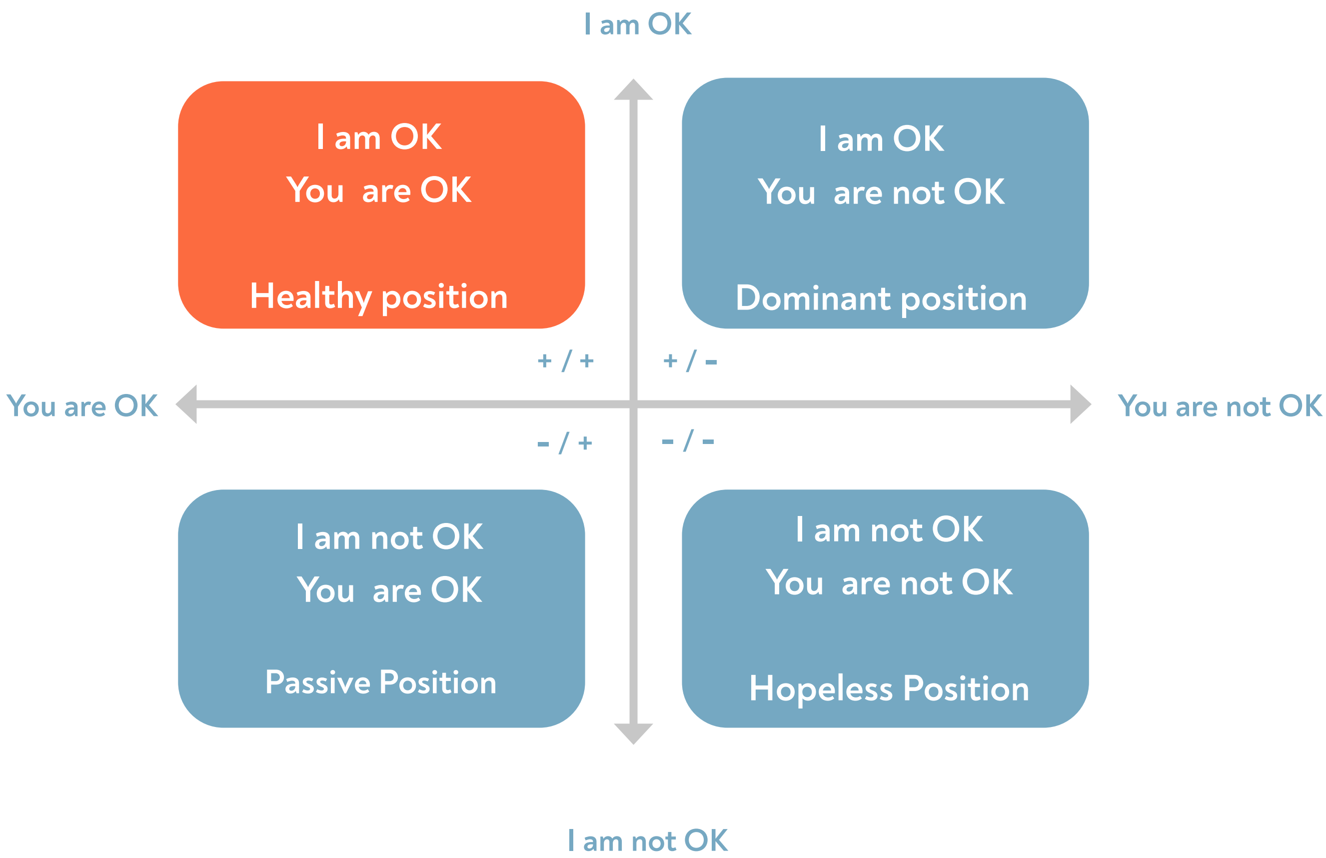
This means it is possible to adopt 1 of 4 different attitudes:

- I am OK - You are OK
- I am OK - You are not OK
- I am not OK – You are OK
- I am not OK - You are not OK

When working with others, the assumptions we make about ourselves and others are often more important than what we say. These implicit beliefs influence the climate of conversation (inclusive or exclusive), the way we communicate, and the quality of the solutions we find. Healthy communication and true understanding are only possible in the first situation: 'I am OK – You are OK'.

No one has a 100% attitude: 'I am OK - You are OK'. The key lies in self-awareness, in observing one's own attitude and being able to think about oneself and about other people in terms of 'OK' again.

4 life positions in which you can find yourself



INSTRUCTIONS

Read a description of the different attitudes and diagnose which one describes you most.

I am OK - You are OK

Such people trust themselves and trust others. They respect their own values, focus on their own needs and are also able to ask for support and help. At the same time, they respect the values of others, their needs and are willing to provide support. They believe that it is possible to find win-win solutions, in which they do not have to give in or dominate. Thanks to this attitude they are calm and stable. They courageously conduct difficult conversations, because no matter how difficult the subject is, they maintain respect for themselves and others. They do not cross borders and do not allow their own borders to be crossed

Attitude	Example statements
I am OK – You are OK	• I can do this job. There are people in our team who will do it just as well. • I was surprised by the accusation of discrimination, so I want to find out what is perceived by colleagues as discriminatory in my behaviour. • I have a ready-made solution to this idea, but I am also happy to learn other approaches. • Although I was prepared, the commitment of the participants was less than I expected. I will ask them what has caused this.

What can be characteristic of this attitude?

- Listening to others
- Respecting the diversity of opinions
- Defending one's rights / recognising the rights of others
- Talking openly about their needs
- Curiosity towards interlocutors
- Yes means yes, no means no
- Transparency

I am OK – You are not OK

These people have confidence in themselves and their own competences. They focus on their own needs and strive to meet them. They often experience situations where they are right, and others are wrong. They feel that they are surrounded by people who are either not as competent, not as good, or not as committed as they are. They lack confidence in the competence of the people they work with. This causes them to fight for their rights and want to impose their own solutions. They are seen as dominant, apodictic, and directive-based. They tend to enter the role of the so-called 'persecutor' and 'rescuer' (see tool: 'drama triangle').

Attitude	Example statements
I am OK – You are not OK	• If I do not take care of it, no one will do it as well as I could. • I have never experienced discrimination, which means that minorities are just exaggerating. • I have known how to solve this for a long time, why are we wasting time collecting other opinions? • I have prepared a great training course, and they have underestimated its value.

What can be characteristic of this attitude?

- Dominating conversations
- Interrupting others
- Deciding on solutions in advance
- Taking the initiative on behalf of others
- Blaming others
- Showing no interest in the opinions of others
- Not considering the needs of interested parties when creating solutions
- Applying pressure
- Being guided solely by your own goals

I am not OK - You are OK

These people have no confidence in themselves or their competences. They do not focus on their own needs but orient themselves to the needs of their fellow human beings. They often experience situations in which they believe they are in the wrong and others are in the right. They allow others to violate their boundaries. They feel that everyone around them is more competent, better, etc. than they are. They lack self-confidence. They allow themselves to be led by others. They do not engage in critical thinking, and when they do, they behave negatively. They then simply get angry and behave passively or aggressively. They are perceived as submissive and without having an opinion of their own. They tend to slip into the so-called 'victim role' (see tool: "drama triangle").

Attitude	Example statements
I am not OK - You are OK	• It is better not to undertake this task, because others will undoubtedly do it better. • I have such a low level of competence in inclusive leadership that I will certainly continue to unconsciously discriminate against others. • When I listen to other ideas, I am ashamed that mine are so uncreative. • It was such a great group. They were right to underestimate my work. I am a bad trainer.

What can be characteristic of this attitude?

- Not talking directly about difficult situations
- Hiding anger / resentment
- Passive-aggressive behaviour
- Apparent consent and then acting in your own way
- Reacting by gossiping, avoiding confrontation
- Not talking about own needs
- Taking the blame on yourself
- Defensive behaviour

I am not OK – You are not OK

These people neither trust themselves nor others. They do not focus on their own needs or those of others. This leads them to avoid communication and withdraw from relationships. For them, no action or contact will result in anything positive. It is an attitude of apathy and hopelessness. If nothing can be done, then there is no point in exposing oneself to unpleasant situations. Such people treat company meetings as rituals to be held. It is difficult to count on their involvement. This is the most difficult of the four attitudes.

Attitude	Example statements
I am not OK – You are not OK	• No matter what we do, we will not manage it anyway. • I know that I unconsciously discriminate, but the majority are discriminatory too. • My ideas are not creative enough, but their ideas are equally weak. • I may not have prepared myself, but their disrespectful atti-tude says a lot about them.

What can be characteristic of this attitude?

- Avoidance
- Stonewalling
- No interest in opinions
- ‘Rituals’ - you must do it because they do it, they don't see the point
- Cancelling meetings
- Apathetic
- Marginal topics (digressions), since nothing makes sense, let it at least be nice
- Not generating ideas, not taking responsibility for them

Your personal life position

If you find it difficult to define your default setting, remember the last 3 difficult situations in which other people were involved. Analyse each of these situations:

- What did you think of yourself then?
- How did you think about others?
- Can you find any common pattern? If not - talk to the people you trust and ask them for feedback.

There is no one in the world who is always in the 'I am OK - You are OK' position. The important thing is to realise what position you are usually in and try to develop yourself so that you are in the 'I am OK - You are OK' position as often as possible.

When you think you are not OK

- Tell others about your needs and values.
- Develop awareness of your talents and strengths.
- Set boundaries.
- Don't blame yourself for your feelings - use them as a source of information.
- Ask for help when you need it.
- Be balanced in giving and taking.
- Enjoy your successes.
- Take time to appreciate yourself.
- Don't take the blame for everyone. Refer to the agreements.
- Accept that you are making mistakes. Assess your behaviour, not what kind of person you are.

When you think others are not OK

- Listen actively.
- Ask open-ended questions to get to know the perspective of others.
- Search for win-win solutions (connecting your needs and the needs of your interlocutor).
- Appreciate the people around you, look for their strengths.
- Don't dominate meetings. Consciously speak up after others have spoken.
- Be curious about other people's attitudes - their needs, values, and motivations.
- Don't blame others for any failures.
- Appreciate the success of others.
- Be balanced in giving and taking.

DAY-TO-DAY SUPPORT

It may be that we occupy different OK positions in a single conversation. For example:

At the start of the conversation we may feel superior to our conversation partner (I am OK – you are not OK). We basically know the solution to a problem and think that our interlocutor is not in the position to make a valuable contribution. But then our interlocutor mentions a vital point that affects the solution and that we have overlooked. That leads to us appreciating our conversation partner's contribution, picking up on their suggestion, and valuing them as a colleague (I am OK – you are OK).

When you find yourself in positions other than 'I am OK – You are OK':

- Change your language from judgement to observation (do not judge or value what you see, just describe what you see).
- Take an attitude of curiosity (say in your mind: this is interesting – it is different from my approach – it´s interesting to see what is behind it). It is a way of looking at reality that you activate naturally by visiting places that are foreign to you.
- Ask the other person about their needs and their values (why do they care so much about it? what is behind this behaviour?).
- You can also tell others about your needs and values.

Conducting conversations using the 'inclusive dialogue' tool will help you to maintain the attitude 'I am OK – You are OK'.

RESOURCES

The author of the method is Eric Berne. The method was also of interest to Claude Steiner, Thomas Harris and Franklin Ernst.

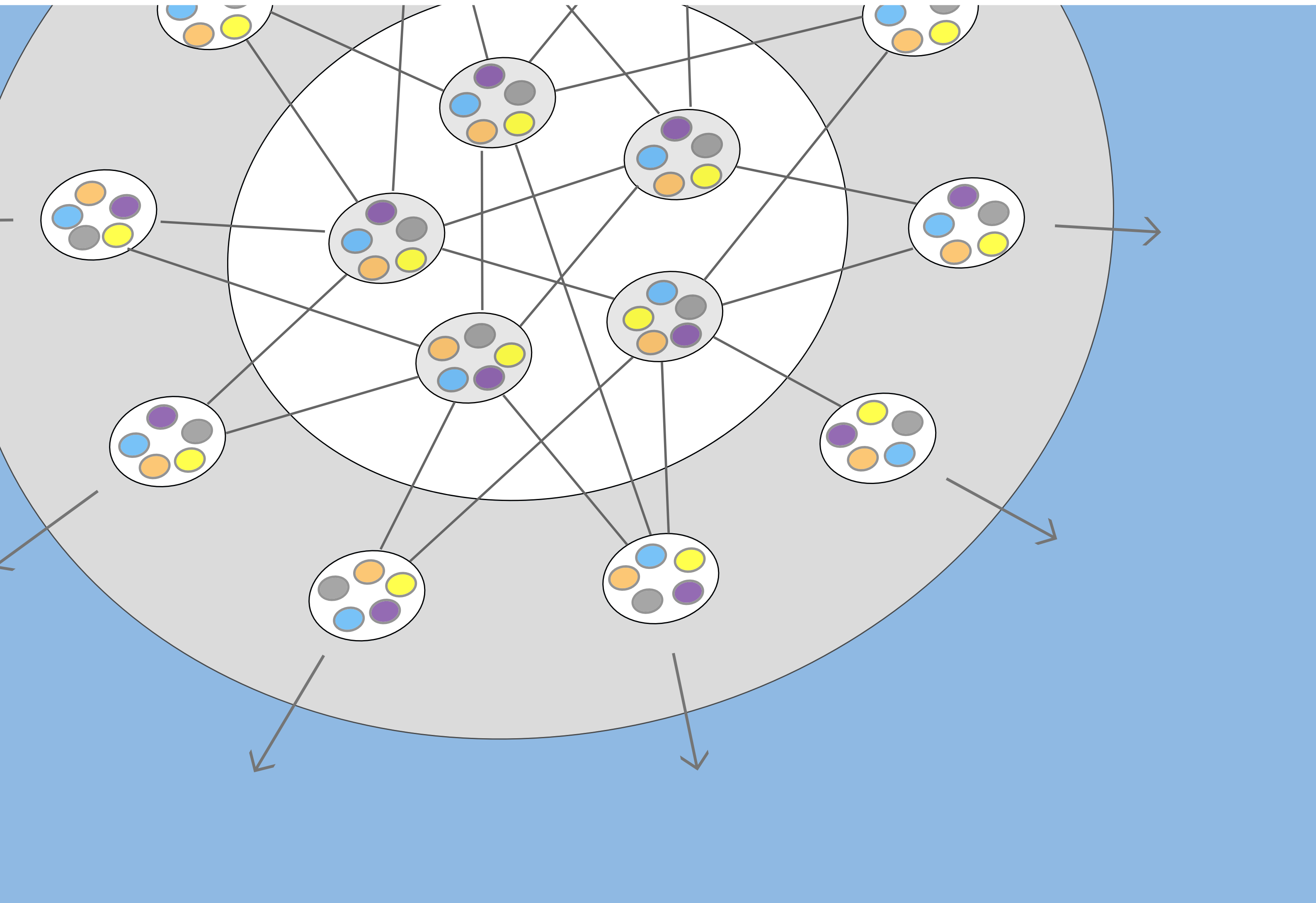
Useful reading:

Stewart, Ian; Joines, Vann (2012): TA Today. A New Introduction to Transactional Analysis; Lifespace Publishing

#i am ok – you are ok #drama triangle #inclusive dialogue

04 Cell Structure Design

‘True leadership arises where
there are no hierarchies.’
Frédéric Laloux



Benefits

When is cell structure design useful?

- When you want customer needs to always take centre stage. This also applies to 'internal' customers.
- When you want the organisation to be able to react more quickly to both internal and external changes.
- When you want to save on unnecessary costs and avoid wasting resources.
- When you want everyone in the organisation to always have access to all relevant information.
- When you want decisions to be made by those who work directly for the customers or target group.
- When you want your leaders to be freed up and gain more time for work 'on' the organisation, rather than carrying out micromanagement.

From practice

Everyone who has dealt with the BetaCodex topic in this handbook will already be familiar with Marie, who was the new manager in a printing business that also ran a copy shop in the local town. Anyone who knows Marie and her company's astonishing success story – the way that they succeeded in the particularly challenging time of the corona pandemic – will ask themselves how this was possible. A few new principles, such as those that BetaCodex suggests, will by themselves probably not lead to a company suddenly going from being on the brink of closing down to running smoothly again and having a sudden rise in their revenue.

That was obviously not the case for Marie. And this is where cell structure design comes into play because this approach makes it possible to bring the BetaCodex principles to life in the real world. Marie discussed different options with Claudia, her organisational consultant, about how she could help the Beta principles break through and simultaneously set her company up in such a way that it would be best prepared for the future.

Amongst other things, Claudia told her about the INCLUDE approach that is particularly aimed at organisations and companies that need or want to digitalise. To achieve this, INCLUDE uses, among other things, methods that are founded on the BetaCodex. This is particularly true when it comes to the specific design for the process of change. One tool that has proved itself to be useful in this context, especially in small and medium-sized organisations, is cell structure design.

Marie and Claudia agreed to suggest cell structure design as a method to the printing and copy shop team for them to spend three months thoroughly experimenting with it. This practical test took place during the heightened challenges of the coronavirus pandemic. That meant, for example, that the number of printing orders had dropped dramatically during this time. The copy shop also had fewer visits from customers and even had to close completely during the lockdown phase. Almost all their customers were working from home, and events that normally would require posters and promotional flyers to be printed were not taking place.

Inspired by the new way of thinking that could already be established in the company during the experimentation phase with cell structure design, the printing team came up with some good ideas. These ideas were the direct result of short zoom meetings with their most important customers, which could take place despite the lockdown and the lack of printing orders, to find out how they could continue to support their customers despite the unfamiliar situation. At one of

these meetings a training academy, that now had to continue 100 percent of their teaching online, expressed a wish for all their lecturers to be provided with background canvases that they could easily set up in their own home offices. This made it possible for the lecturers to quickly shape up any part of their flat for them to carry out their presentations and seminars there. Whether kitchen, lounge, or balcony – in a matter of minutes any location became an online workspace and looked professional for the training participants.

The orders quickly piled up as this new product became known far beyond the first client. It was successful not least because the entire printing and copy shop team, as well as all the employees working in management and Marie herself, were provided with these banners. If often happened that they would then be asked directly during their normal customer conversations about these attractively designed banners that looked significantly better and more authentic that the digitally rendered backgrounds produced by conference software such as Zoom. Almost 50 percent of those who showed an interest ordered a banner for their company within the same week.

This new product was not able to make up for the loss of revenue caused by the coronavirus pandemic. It was clear to everyone in the team, however, that they most likely would not have made it through the pandemic without laying off staff if they had not had this idea. The team were equally clear about what had led them to this idea – their experimental work with the cell structure design approach.

Once the experimental phase was over, the entire team decided together that they would reshape the company from the ground up in line with cell structure design. The former management team, for example, has recently started referring to itself as 'internal happiness management', and Marie no longer wants to be addressed as manager. She is now a 'first class caretaker'. There was obviously a lot more work involved with the introduction of cell structure design than simply adapting the traditional job descriptions and titles to the new cell structure reality. These two examples make very clear, however, what a journey that entire company has gone through. They also make it possible to understand the fun and contentment that everyone in the team is experiencing now because, after a long period of drought, cell structure has helped them to regain market success and customer recognition.

In a nutshell

Cell structure design[1] changes the perspective for the way organisations are thought about and portrayed. Instead of a 'top' and a 'bottom' with departments and sub-departments like in a traditional pyramid structure, cell structure design organises organisations and companies from 'outside' to 'inside'. The main driving forces for cell structure design are the external market and the needs that visibly emerge in this market. The central components of this organisational concept are autonomous cells that review their own achievements and present these achievements to all stakeholders.

Cell structure design has a positive impact because customer needs and market developments are placed at the centre. Those cells that work directly with customers drive the entire organisation. Traditional decision-makers also remain important in cell structure design, but the organisation's main activities are organised systematically so that requirements of the market or of their customers is at the core of all decisions.

The basic idea behind cell structure design is that an organisation's added value always comes at the point where customers are prepared to pay an invoice for it. For non-profit organisations we can find an equivalent to the paying customer in the distinct target group that makes use of what the organisation has to offer. Cell structure design achieves its full effect when productive work is being done for customers or target groups.

Cell structure design, which is founded on the principles of the BetaCodex (also in this chapter), is a shortcut primarily for small and medium-sized organisations to adjust structurally and systematically to the changes that digital transformation demands of everyone.

[1] This tool description was inspired by cell structure design. Cell structure design is an open-source social technology designed by Niels Pfläging and Silke Hermann. It was published under the licence CC-BY-SA-4.0 and can be found at this link: www.redforty2.com/cellstructuredesign. You can find out more about other interesting resources in the 'resources' section.

Cell Structure Design

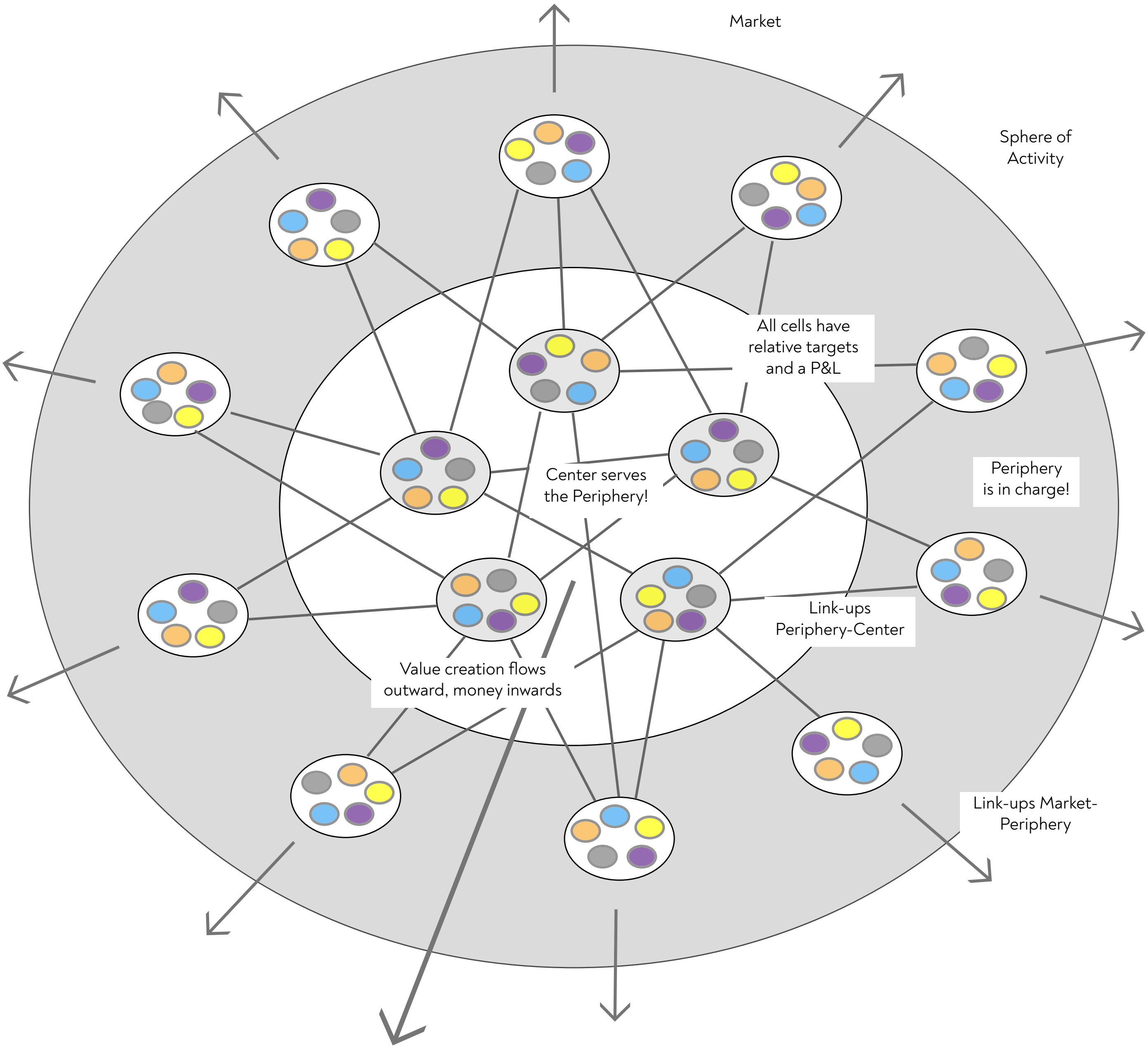
Cell Structure Design has three components: The 12 principles ('laws') of the BetaCodex, 12 principles of Cell structure Design, and 8 practical recommendations.[2]

The 12 principles of the BetaCodex

Principles	Do this!	Not that!
01. Team autonomy	Connectedness with purpose	Not dependency
02. Federalisation	Integration into cells	Not division into silos
03. Leaderships	Self-organisation	Not management
04. All-around success	Comprehensive fitness	Not mono-maximisation
05. Transparency	Flow intelligence	Not power obstruction
06. Market orientation	Relative targets	Not top-down prescription
07. Conditional income	Participation	Not incentives
08. Presence of mind	Preparation	Not planned economy
09. Rhythm	Tact & groove	Not fiscal-year orientation
10. Mastery-based decision	Consequence	Not bureaucracy
11. Resource discipline	Expedience	Not status-orientation
12. Flow coordination	Value-creation dynamics	Not static allocations

[2] Cf. Cell structure design by Niels Pfläging & Silke Hermann: https://www.redforty².com/cellstructuredesign

Center - Periphery - Market: the interplay



12 principles of Cell Structure Design

01. Sphere of Activity: to be sharpened, put in writing & socialized!
02. Periphery & Center: Cells in the Periphery have market contact; cells in the Center don't.
03. Link-ups Periphery / Center: Periphery is in charge; Center serves the Periphery.
04. The more Periphery cells, compared to Center cells, the more market dynamic will unfold.
05. Cells are functionally integrated: They (almost) always cover several functions and many roles.
06. Cell team size: It is always 5 to 8 people, ideally. Team members each fill in a variety of roles.
07. Periphery cells: Have maximum autonomy, 'own' external customers, earn a profit margin.
08. Central cells: Make neither profit nor loss; have Periphery cells as their customers.
09. Central cells have catalogs of 5 to 7 services each; negotiate their prices with the Periphery.
10. Cells have Relative Targets and a Profit and Loss Statement; Periphery cells pay the Center.
11. Transparency: Numbers of the organisation & cells are public, visible & available fast.
12. Periphery cells cooperate and help each other, can make agreements with each other.

8 recommendations on Cell Structure Design

01. The appropriate design sequence: First the Sphere of Activity. Then Periphery. Then Center.
02. Systematic & conscious work around language: Actively socialize Cell Structure Design terminology.
03. A highly inviting workshop sequence: A great number of people elaborate the design, together – e.g. as part of OpenSpace Beta.
04. Cells are constituted by their teams: After the workshop sequence, teams define cell identities / membranes, themselves.
05. Updates: Cells update their written cell identities, at least annually.
06. Organisational Hygiene: Eliminate rules, roles of coordination and methods of steering.
07. Knowledge conferences, communities & other interaction formats serve networking and learning within the Cell Structure.
08. Cyclic OpenSpace meetings serve iterative design improvement – 'with potentially everyone'.

INSTRUCTIONS

BetaCodex is the basis for cell structure design

Before you introduce cell structure design into your organisation, you should familiarise yourself with the ideas behind the concept. Cell structure design would not be conceivable without the BetaCodex mindset that is presented in detail in the tool of the same name in this handbook. This is also true the other way round. A Beta organisation can be particularly well achieved with the cell structure design approach. The BetaCodex approach has little to do with traditional management as it is taught in business management studies (see also the graphic above, which includes a comparison of Alpha and Beta). The easiest way to understand the BetaCodex approach is by contrasting it with the traditional Alpha management system. Here, for example, the boss does not set targets. People orient themselves instead directly around the market and customer needs. In Beta mode, progress is formulated in terms of relative goals based on the current situation and is constantly self-assessed by teams who act autonomously.

When the Beta principles are put to practice in cell structure design, two important advantages come to light. First, the BetaCodex makes it possible for you to stay abreast of the complexity and changing dynamic of today's markets. Second, Beta makes better use of the human temperament, including when it comes to new ideas, to innovation, and to the motivation of all those involved. This will have a positive impact on the organisation, on the one hand, and on the other hand has the potential to boost the motivation of everyone.

Five central elements that make up cell structure design

Cell structure design is the opposite of central governance. An emphasis is placed instead on de-central self-organisation. This means that an organisation's environment, especially the markets in which the organisation is active, provide the decisive stimuli. There are five dynamics or elements that work together in this (cf. graphic above):

1. Self-organisation with cell structure design works from the outside in. The **markets** direct the organisation, for example by 'pulling' it in a particular direction. By taking external (market) stimuli as the foundation for all internal activities, you will systematically reduce unhelpful developments such as wrong decisions that have been made by over-stretched managers.
2. The **organisational boundary** separates the inside from the outside. The actual business operations take place within the organisational boundary, and the organisation works within the parameters of the external border and expands its activities to meet market needs.
3. **Cells:** these are the central components of cell structure design in an organisation. In every organisation there are two types of cells. On the one hand there are the periphery cells, in other words the cells that are in direct contact with the market. On the other hand, there are the central cells that are not in direct contact with the market.
4. **Interfaces or connections between the market and periphery cells.** This is where the external creation of value and performance relationships are based,

in other words everything that external customers pay for, to give one example.

5. **Interfaces or connections between the periphery cells and the central cells.** This is where the internal creation of value and exchange of services takes place. Internal 'customers' from the periphery 'pay' theoretical 'bills' for the supporting work of the central cells. This is how the contribution of the internal management cells, for example, can be quantified.

Niels Pfläging und Silke Hermann, the initiators of cell structure design, particularly emphasise the relevance of the entire organisation's alignment to the surrounding markets. They call this the 'market pull'. The market pulls the organisation in the direction that allows value to be created for the customers and target groups in the way that these have asked for and really do need. The result is that traditional change management becomes effectively obsolete since permanent change is de facto directly implanted into the organisation's DNA.

Two roles – centre and periphery

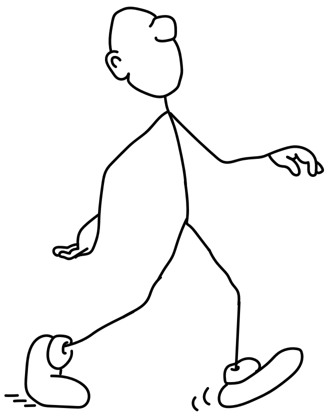
In essence, cell structure design is all about granting the greatest possible autonomy to the periphery. Power and the responsibility to make decisions is transferred from the centre (e.g., an executive board with oversight over everything) to those who actually 'carry out' the business, in other words those who are in contact with the customers. Because this difference is so important, you must understand exactly what distinguishes the centre from the periphery.

From a size of roughly ten people upwards the following change takes place: an organisation loses its one cell status, in which all those involved can still very easily switch between different roles and all of those involved work de facto on the market. As soon as an organisation grows, two types of roles emerge, meaning that not everyone is working as closely as each other to the needs of the market:

Periphery roles create the contributions directly on the market that bills are paid for. Without these payments the wages could not be paid out. Everyone who is working in a periphery role has the opportunity to learn directly from the market.

Central roles do not have this direct access to the market. It is their job to render services to the periphery. They 'only' learn from the periphery since it acts in isolation from the market. It is also possible to put this another way: for those providing the organisation's internal services to the centre, the market is their own periphery. The periphery has the job of 'pulling' the centre, for example by encouraging accounting to make numbers about the business development available in as current and transparent a way as possible.

It is important to proceed with caution when thinking about the periphery and the centre, to avoid mixing up the traditional roles with the roles of cell structure design. A manager is not automatically centre, and a sales representative is not periphery by default. The distinction between periphery and centre is all about roles, tasks, and functions. Isolated, traditional job titles, such as those found on business cards, are not in view here.



Formulate business model	Design peripheral cells	Design center cells	Set up cells + infrastructure	'Contracts' + Agreements

Cell structure design – step by step

The basic idea behind the introduction of cell structure design is: 'from the outside in'. If you let yourself be led by this maxim then it will be easier to establish the complex external market processes and market information as the central starting point for creating value in an organisation, and at the same time to take care of the shift of decision-making responsibility to the periphery. Before you focus on cell structure, however, you must carry out a clear delineation of the organisation from the outside.

Cell structure design can be established in five consecutive steps. Bear in mind that you do not have to follow these steps mechanically one after the other. The approach suggested here is intended by the initiators to be understood heuristically and not as a mechanical rote plan.

1. Start by formulating your **business model as clearly and as understandably as possible:** anyone who does not know what and why they are doing something will also not be able to develop a cell structure for it! The foundation for the design of cells and of the entire structure will not be laid until your organisation has formulated its own business operations in writing in such a way that it can be easily understood by all stakeholders, whether internal or external.

Cell structure design can help your business model to achieve success on the market when, for example, you create better offers that give you an advantage over your competitors. You must first be clear about what makes your business model stand out and why you follow your goals. We recommend that you still run through this process of clarification (again), even if you really believe that everything is already clear. The 'golden circle' tool and the 'Digital Transformation Tool' is this handbook are the best way to proceed with this.

2. **Design periphery cells:** once you have clarified your business model it will be possible to draft the periphery cells that will be acting close to the market. The important questions now are: what functions belong to the periphery? Which roles and role constellations should be considered? Bear in mind: in a cell structure everyone has several roles at once, sometimes even several different roles. You should still make sure, however, that everyone initially has a 'home cell' as the cell in the organisation that they actually belong to.

3. **Design central cells:** you are on the right path if you proceed in line with the motto 'the only things to be become central cells are those that cannot possibly be made to fit into the periphery'. In the centre you will find two roles that create value. On the one hand there are the roles that work for the

periphery, and on the other hand there are the roles that serve the organisation's entire structure, such as the management, for example. Cells that work for the periphery should assume a serving attitude. They do not dominate or monitor the periphery and they also do not make any decisions for the periphery. If cell structure design is to work, then the central cells need to charge for their services to the periphery. Having an internal market with internal prices will prevent the centre from becoming primarily obsessed with itself – something that can so often be observed in organisations. The only way for the central cells to generate income for their calculated profit and loss statement (P + L) is to 'sell' themselves internally to the periphery. You will be amazed how well this approach works as a medicine against waste and idleness.

Central services that are offered to the periphery could be, for example, the management's 'compliance relevant activities', accounting, or quality management (e.g., certification). 'Administrative contributions' (e.g., reception, personal administration) and 'supply of information' (e.g., IT system administration or writing reports) also traditionally belong in this category.

In very small organisations or companies it is usually sufficient for you to integrate all central contributions into one to three small 'central shops'. An 'organisational shop' could, for example, supply all the services that the periphery needs to be able to work effectively. You could 'offer' a lot of internal services in this shop, from help cleaning to the CEO role. Think about how you could organise the internal services in the easiest and best functioning way. Cells that are too small and role definitions that are too narrow are usually not helpful since they lead to monotonous, constantly repetitive work. If you would like to have a team that is interested in enterprise and thinks with you, then you must create varied job profiles, particularly in the centre.

4. **Set up all the cells and the necessary infrastructure:** once the first three steps have been thought through – business model, periphery cells, and central cells – the interaction between the cells can begin. This is now the step from the design of the cell structure to the working of the cell structure in your business operations. The cells start to set themselves up. They each develop their own identity that will clearly distinguish them from other cells. The cells are equipped with the necessary tools and resources to be able to provide their contributions in a self-reliant way. Amongst other things, they will create their own profit and

loss statement, agree on sensible figures for measuring their performance, and ensure that their activities are sufficiently transparent. Once compiled, it will be possible to use this information to also determine the performance of the entire cell network – in other words the performance of your organisation as a whole.

5. **'Contracts' and agreements between cells:** you have now laid the basis for your organisation's internal 'negotiations' about performance, prices, and fine adjustments to the seams between the cells. When doing this it is important to consider that internal markets obviously do not function like real markets. They can, however, be set up in a way that is very similar to the market. If each cell becomes a quasi-autonomous mini company within the organisation's entire structure, then other decision-making processes that those of top-down structures are made possible. Each periphery cell can decide on its own whether, for example, it wants to request the required contributions from their own centre or externally from the market. Services from the organisation's own centre that are too expensive or that no one needs can be identified by all those involved. Because they contribute nothing to the central cells P+L (they generate no revenue), those in the 'organisational shop' will, for example, very quickly focus on offering the necessary services at 'competitive' prices. For the cell structure system to achieve its full effect, all the relevant figures and financial information must be made available to all the cells quickly, transparently, and in an easily comparable way. This is the mandatory pre-requisite for measuring the success of each of the separate cells and, when taken as a whole, for measuring the success of the entire organisation.

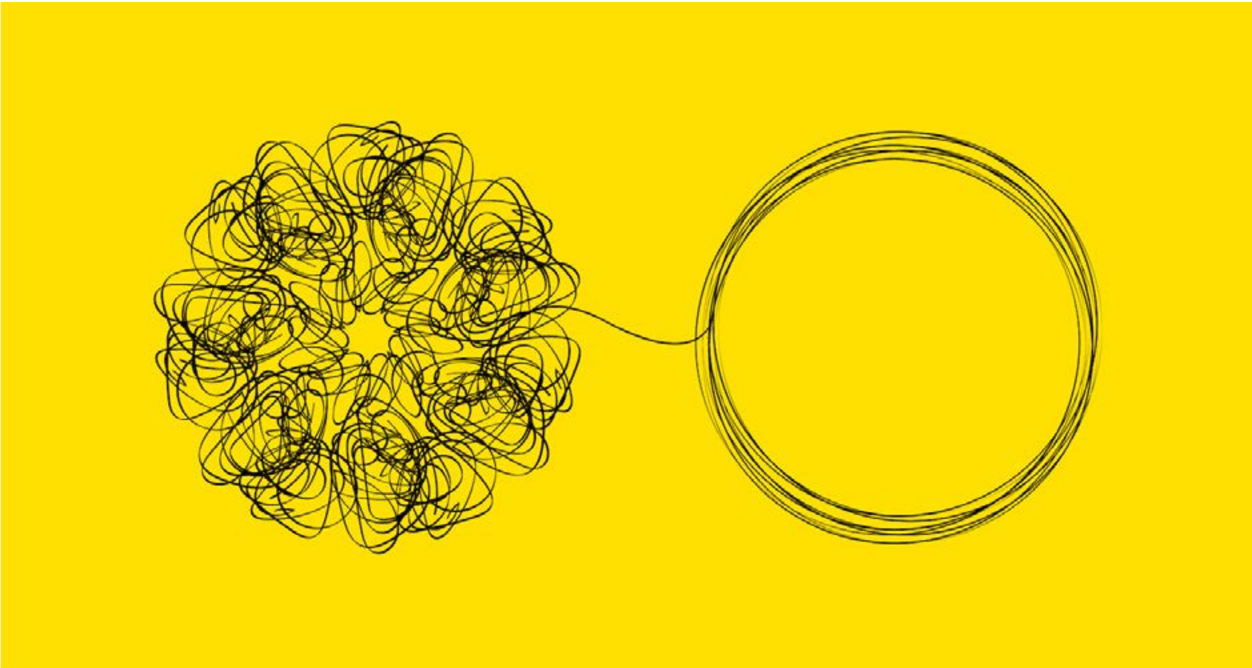
DAY-TO-DAY SUPPORT

Communication is everything

Cell structure design can only work if the communication in an organisation works well. This is important emphasise because communication relationships are not at the centre of the cell structure design approach. This approach is much more directed at creating values, in other words the question of who creates which values in an organisation and how this creation of values is organised. For inclusive leaders it may be self-evident that communication is being emphasised. Those who have just started to make their way towards inclusive leadership are reminded here that cell structure design is not a lucky bag that you only have to unpack for everything to start working all by itself. Cell structure design specifies a basic structural idea that must, however, be worked out individually in practice in every organisation. It will not work without the appropriate communication tools and an open culture of communication. In this handbook your will find various tools for communicating and making decisions that you can use in tandem with the introduction of the cell structure design approach.

Digital transformation requires innovation – who is responsible for this?

Innovation is always a role that the centre is responsible for. Why is this the case? According to the cell structure design concept, something that is new does not (yet) have anything to do with the creation of value that leads to customers paying their bills on the market. It is right, however, that many important foundations for new products and services – in reality perhaps even the majority – are 'discovered' in the periphery, because this works closely with the market and directly recognises the wishes and problems of customers. It can therefore certainly be the case that something innovative or new is first discovered and offered by a periphery cell. To speak of real innovation, however, the centre must put the innovation hat on. In practice this is less complicated than it may appear in theory. Everyone in the organisation can wear several hats. It is for this reason that those in the periphery who find new ideas or solutions, or even products that prove that customers are prepared to pay for it, always be the first to be integrated into the cell that drives innovation in the centre.



Learning a new language

Anyone who wants to introduce cell structure design should make the effort to learn the corresponding language or terminology of cell structure design. In effect, this is all about learning and using around 50 foundational ‘pieces of vocabulary’ for this new ‘language’. It is all about consciously leaving the language of top-down organisational structures behind – we want to swap old pieces of vocabulary out for new ones. This is not at all easy because we’ve grown up from our earliest days with the language for a management team that is responsible for everything. Family, school, professional training and perhaps a degree are all deeply rooted in the top-down world. It requires some practice and conscious avoidance of words if you want to bid farewell to all of this. A few examples will make this clear. You should talk about outside / inside and no (longer) about top / bottom; about business cells and no (longer) about sales; about dialogue and no (longer) about feedback; about roles or role portfolios instead of about (former) positions, posts, or jobs; about preparation instead of about (former) planning and, last but not least, about cells and no (longer) about departments.

In practice, the old language will continue to be spoken for a long time. Attentive readers will even find it in many parts of this handbook. Anyone who can discover and decipher it is, however, already on the best past towards speaking and living ‘cell structure design’.

Workshops, conferences, and meetings

It is best if an organisation's specific cell structure design is developed (not planned ☺) by as many people as possible in an organisation, ideally by everyone. Carry out workshops within your organisation, ideally embedded in the step-by-step INCLUDE process as it is presented in chapter 4. Knowledge conferences or communities of interest / practice / problems etc. are particularly well-suited for ensuring permanent exchange, learning, and networking within an organisation. You can drive the further development of cell structure design well within the entire organisation with recurring open space meetings as they are envisaged in the INCLUDE approach.

It is never finished! Or, developing a love for 'permanent Beta'

Work on the specific cell structure design of an organisation or a company is never done. The organisation's environment is constantly changing. New technologies may even challenge the entire prior business model. It must therefore be repeatedly reviewed, adjusted, and changed for the cell structure to serve the organisation's creation of value as well as possible. It is important for all those involved to understand this already when cell structure design is introduced – it is best however if they welcome it 100 percent. 'Permanent Beta', in other words deliberately and consciously living with 'good enough for now', will then become a competitive advantage and every improvement in the organisation's structure will become a source of new insights into the functions of the organisation itself, as well as into the market opportunities.

RESOURCES

Cell structure design is an open-source social technology by Niels Pfläging und Silke Hermann. You can find further in-depth information here:
https://www.redforty2.com/cellstructuredesign

The following offers a good and comprehensive theoretical derivation, including practical examples: 'Turn your company outside-in!'. A white paper on Cell Structure Design:
https://www.redforty2.com/cellstructuredesign/ (Presentation).

#betacodex #self-organisation #added value #golden circle #transparency

05 Open Space for Organisations

'Without passion, nobody cares.
Without responsibility,
nothing gets done.'
Harrison Owen

Benefits

When is Open Space especially useful?

→ When you have to solve an urgent and complex problem that is pertinent to the majority of your employees.

→ When you can assume that potential participants will have a genuine interest in solving a problem, when as many people as possible with different expertises etc. come together, and when you anticipate that discussions about solving the problem could generate conflict.

→ When you would like to find the solution to a challenge together with your team and to delegate responsibility.

→ When you believe that your organisation responds to challenges too slowly.

→ When you believe that you cannot keep doing things the way they have been done in the past, in other words you know that something needs to fundamentally change in your organisational model

From practice

As managers, Gabi and Thomas lead a consulting company with 18 employees together. In addition to this, their company works with a lot of freelance consultants. Despite the organisation's relatively small size, a certain 'silo mentality' has crept in during the past few years. The employees who are primarily involved in the day-to-day consultation work expect the two marketing and sales representatives to provide them with all of their new customers. They have no interest in supporting them in this work themselves, because they want to concentrate fully on their work creating content.

At the same time, the demand for consultation in the company's main area of business is gradually receding. If something doesn't change quickly, it looks as if the years of growth and constant success will be replaced by a need to start saving. There have been numerous thoughts of introducing new products, especially those linked to digital information, but these ideas have tended to be side-lined as the involved parties are simply too involved with their daily responsibilities. For a long time, conversations between employees or exchanges with the managers have reached the same conclusion: 'We need to do this or that quickly, otherwise things could get difficult.'

Gabi remembers taking part in an Open Space conference whilst doing voluntary work for a refugee organisation a few years ago. She can still remember how productive this teamwork was and how the work of the refugee organisation, which had been completely private up until that point, had become noticeably more professional as a result. Surely the same must also be possible in our company, she thinks. She convinces Thomas to give it a go, although he is very sceptical at first. They employ an experienced Open Space facilitator and spend time getting to know the requirements and opportunities of the Open Space format for themselves. After two months they are ready to go. A total of 22 people meet in the Open Space and spend two days discussing the topic: 'Growing not Saving: We want to try something new again!' Alongside almost all of the colleagues are also seven external consultants who the company has worked together with in various capacities for over ten years. Thomas was convinced that the company would be able to especially benefit from the rich experience of the external consultants. He was proven right. It was an idea from one of the external consultants that turned out to play the decisive role in the development of what has gone on to be a very successful product.

Looking back, this Open Space conference was the starting point for Gabi, Thomas and the whole team to launch out on a longer process of organisational development that has enabled the company to increase their self-organisation. The divisions of consulting and marketing etc. were abolished. All of the internal consultants now work actively in customer care, for example – one key reason being that this also has an impact on the content of their work.

In a nutshell

Open Space is really just a synonym for self-organisation. This event format allows you to achieve a high level of engagement for a particular topic. This is possible because an Open Space conference is only attended by people who consider the event's topic to be important. In addition to this, all of the participants are told that they are themselves responsible for learning and contributing something useful during the course of the Open Space conference. All of the participants know that it depends on them to make the Open Space event a success. The result of this is the Open Space conferences proceed more productively and with a great focus on action than traditional event formats. Open Space is particularly well suited to complex situations, for example when a new strategy or product needs to be developed, or when different steps for implementing a new strategy need to be determined, coordinated and set into motion.

back

The four principles of Open Space for organisations

'Those who are present are just the right ones.'

'Whatever happens is the only thing that could have happened.'

'It will start when the time is right'

'When it's over, it's over. When it isn't over, it isn't over'

'Keep your eyes open and expect to be surprised!'

INSTRUCTIONS

Foundations

There are a few things required for Open Space to work. In other words, if the following aspects do not apply, then you should carefully consider whether Open Space really is the right approach.

Important topic

The topic for an Open Space conference is of crucial importance. It needs to appeal to the participants and be formulated in a way that makes it clear that there will be a discussion and solution of an important and exciting question, as well as a foundational and complex challenge. Make sure that the title you choose for the conference makes clear to everyone what it is about. The topic needs to be specific. At the same time, it is important to leave enough leeway for an exchange of thoughts and ideas that is open to different results.

Groups that are as heterogeneous as possible

You want everyone that you need for the solution of your initial problem to participate in your Open Space event. Groups that bring together as many different skills and perspec-

tives as possible in relation to the topic and those involved are best for this. There is absolutely no limit to the number of participants in Open Space. If there are fewer than 20 people in your organisation then you could think about whether you would also like to invite customers, suppliers, consultants or, for example, representatives of your professional association. Smaller groups inevitably involve less diversity. This does not mean, however, that you cannot still work with the Open Space principles

Voluntary participation

Those that come to your Open Space should take part 100% voluntarily. Self-organisation, in other words the voluntary acceptance of responsibility or involvement in a thing or an idea, simply cannot be achieved through work contracts or commands. Those that come should be there because they want to be there. If participation is mandatory, this can have a destructive impact on the event.

Unknown solution

Open Space is a waste of time if it obvious what needs to happen. Conversely, this method is very useful when no one in the room knows the solution. Open Space is not suitable for increasing the acceptance of a change of strategy that has been determined in advance by the organisation's leadership, for example. Pseudo Open Space events are doomed to failure because the participants will notice that they are being manipulated.

Conflicts are likely

Without conflicts, disagreements or even arguments there cannot be any progress. A complex topic will automatically provoke different viewpoints that can be dealt with and analysed in the Open Space. The more heterogeneous the make-up of the groups is, the more likely it is that there will be conflicts. This is good.

It is urgent

The topic should be a burning issue for as many of the participants as possible. It is advantageous if everyone thinks that the solution should really have already been in place yesterday

The space needs to suit

Ait is necessary to have enough room for everyone to be able to freely move around. It must be possible for all of the participants to sit together in a circle in one room. You will not need much more other than enough chairs, a large wall (usually a lot of pinboards) and paper and pens. Tables just get in the way and should be moved to one side. It is good if the main room where everyone meets also has enough space for the separate working groups. If not, then these groups can meet in additional break-out rooms or find other places that are easy to get to. In a group of around 50 people you will need to have between 4 and 6 separate working areas for the group working stage.

Enough time

For foundational processes of development you should if possible spend two, sometimes even three days in the Open Space. This will enable a deeper analysis of the problem, give all of those involved the chance to reflect on their experiences over the day, and provide enough time for a plan of action with conclusion that are as specific as possible. Alongside the duration of the event, the 'integrity' of the Open Space time is also critical. Presentations, e.g. from leading members or external experts, as well as any kind of interruption that does not belong to the Open Space process, is harmful. These can take place either beforehand or afterwards.

Roles

At an Open Space conference you need to distinguish between four roles. These people will have clear activities and will all contribute to the success of the event:

- **Organiser / Sponsors:** the organiser or sponsor of an Open Space conference has the formal authority to authorise the Open Space. This is generally a leader, for example the manager in a company or an organisation. During the Open Space the organiser / sponsor will quickly merge into the background. Once he or she has handed over responsibility for carrying out the Open Space to the facilitator, the organiser or sponsor will join the group of participants and take part in the Open Space.
- **Facilitator:** the role of the facilitator is to accompany the Open Space from start to finish. Two things are necessary for this: firstly, the authority to carry out the event that has been given to him or her by the organiser or sponsor. Secondly, the expertise to open up the space needed for self-organisation and ensure that the basic requirements of a functioning Open Space are maintained for the entire duration of the event. In Open Space terminology people talk about 'keeping the room open'. The facilitator will hand over the main responsibility for the success of the Open Space to the participants right at the start.
- **Participants:** the participants will quickly assume the main role in the Open Space. They can decide for themselves which work groups they would like to join, what information they will share and with whom they share it, and what they would like to discuss or deal with during the event. No one can control what they want to do and when they can do it. If the participants decide to summon a meeting for the work groups, then they simply assume responsibility for this meeting.
- **Participants as work groups facilitators:** each participant has the opportunity at the start and throughout the Open Space to initiate work groups. In so doing they are taking on the role of allowing contributions from all participants in their work group and ensuring that the results of this meeting are documented for all of the Open Space participants.

Implementation / Procedure

Open Space is all about letting the powers of self-organisation blossom. This requires well thought-out preparation and can be implemented in line with a pattern that has already been tried and tested in several thousand Open Space events.

Preparation (planning or planning meeting)

One or more people will take on the planning of the Open Space. If an external facilitator will be employed, then he or she should already be involved in the planning phase. Professional Open Space facilitators will also moderate the planning process. The main task in the planning phase is to define a good topic for the Open Space event. It works best to invite several people from the organisation to help with this, for example in preparatory workshops, in order to ensure sufficient heterogeneity even at this stage and to allow different viewpoints to be expressed. The topic for the Open Space should be announced at least four weeks before the event. This gives enough time for all of those involved in the preparation, especially the sponsor or organiser, to encourage others to attend the Open Space. It also lets potential participants decide in their own time whether they would like to be part of the Open Space.

Invitation

In the written invitation to the Open Space the following aspects should be taken into account:

- Why is the topic of the meeting important for your organisation or company?
- The invitation will show how urgent your concern is, for example by using phrases such as 'things are going badly in area XYZ of our business, and therefore we should…' or 'We need to pay attention to the topic XYZ now if we are to use this technological advance' etc.
- You will provide the necessary information about the Open Space method.
- You will give information about the location and time of the event.
- You will give enough time to all of those invited to decide whether they would like to be there. All those who are interested should confirm their participation in writing.
- You will make clear that participation is 100% voluntary. Anyone who does not want to be there can continue with their usual tasks instead.
- The invitation will be signed and sent out by you personally.
- Once you have sent the invitation you will use all possible channels to draw attention to the Open Space event. Use the meeting as an internal topic of discussion to be spoken about. Use your interactions with your team to make them aware of the upcoming meeting.

Open Space event

Distinguish between the following phases when implementing the Open Space:

- **Opening:** at the beginning all participants will sit in a circle – depending on the number of participants you could also set up the chairs in a series of concentric circles. In the middle of the circle there will generally be some working materials set out to help set the agenda for the conference. The centre of the circle will be empty apart from these. The organiser or sponsor will greet everyone and briefly explain the reason for the Open Space event. The shorter and pithier the better. The facilitator will then spend around 15 to 20 minutes introducing the Open Space method. This means that all of the participants will have received the information they need to start moving confidently and in a self-organised way in the Open Space.
- **Setting the agenda:** a conference that does not have a previously prepared and detailed agenda is foreign to most people. How could this work? In Open Space the facilitator will invite all participants at the end of his introduction to state their personal concerns or ideas that are relevant to the topic of the Open Space event. These concerns and ideas will then become the focus of the sessions

in work groups that will be carried out throughout the Open Space. All of the participants' concerns will be placed on the agenda wall (that could, for example, be made up of several pinboards), so that it is clear to everyone when and where to meet to discuss this topic. For example, with 20 Open Space participants you can count on around 12 to 16 different topics for the work groups

- **Market place:** once all of the concerns and topics for the work groups have been collated then the facilitator will open up the marketplace. This is also the point for the facilitator to step back from the centre and transfer 100% of the responsibility for the success and the results into the hands of the participants. The facilitator will only become visible to most of the participants again at the very end of the Open Space. The following things will take place in the marketplace phase: all of the participants will go to the agenda wall where all of the topics and meeting times have now been clearly documented. They will have another good look at the different topics and will decide which sessions are of particular interest to them. The participants now have the option of fine tuning and optimising the planning amongst themselves. It may be, for example, that someone would really like to participate in two sessions that have been planned for the same time. In this instance they could work with those who are responsible to move one of the sessions back to a different time. In addition to this, the first discussions about content will almost automatically get going. This will mean that participants may have further new topics to add to the agenda. All participants have the option of doing this at any point during the Open Space event. The agenda wall will thereby keep becoming a monitored starting and meeting point for the participants.
- **Open Space work groups:** the participants will now spend most of the time in the Open Space in work groups. In the indi-

vidual working areas that have prepared for these sessions they will usually find a pinboard, pens and chairs that have been arranged in a semicircle around the pinboard. The participant that proposed the topic to the larger session will begin this phase of work (which usually lasts between 45 and 60 minutes) by briefly explaining the background and the intended content of the session. He or she will then guide the discussion. It is important the course of the discussion, as well as its results, are documented in writing in such a way that they can be used by everyone, including those who did not participate in this group session. Documentation sheets will be prepared for this purpose so that the most important information can be recorded either by hand or online.

- **Breaks:** Open Space arose out of the observation that the really interesting conversations at most conferences almost always took place in the breaks. This is when people can move around freely and talk with those around them about the things that really interest them. The free space that is created in Open Space has the aim of placing this 'break experience' at the very heart of the entire event. This is a key reason why most of the participants at Open Space events find this form of cooperation to be particularly energising and exciting. So, what happens to the breaks, since there should also be time for good food, a coffee, or a short walk? The answer is simple: make sure that you provide enough refreshments and drinks throughout the day, perhaps also an extended buffet meal for a few hours over lunchtime. The participants will then organise their breaks as required.
- **Results and plan of action:** once all of the phases for group work have finished then the entire group will meet again in a circle in the main room where everything began. The facilitator will ask everyone to take some time and to study the results that have been collected. To this end the documentation that was prepared in the individual sessions will have been placed on a documentation wall for all

of the participants to clearly see. All of the participants are then able to add to any of the documentation sheets that are presented there, for example with further ideas, tips or comments. This gives even those people who did not attend the individual sessions the possibility of providing further important input. At the end of this time of reading, the facilitator will ask all participants to sit down in a circle again and to begin the plan of action. On the basis of the experiences that they have had in the Open Space, all of the participants now have the opportunity to initiate some plans for the time after the Open Space. The question they need to answer is: What do you want to take with you after this event? Anyone initiating a plan has the opportunity to briefly introduce it and to look for companions for the work out of the circle of Open Space participants. Agreements about individual plans that arise out of the Open Space should also be documented. The first practical conversations about when and where the collaborative work will start should take place on the spot.

- **Completion:** at the completion of the Open Space conference the focus is on the participants. The work has been done and everyone wants to know how things will go from tomorrow onwards in terms of content. The facilitator will give all of the participants who want it the opportunity to share their personal insights and experiences in the Open Space with everyone else who is present. The Open Space is finished when everyone has had the chance to say what they felt and what is important to them. It is a particular highlight if you can give all of the participants documentation of the entire meeting straightaway at the end of the conference, either as a printout or as a PDF. This is easy to organise and means that all of the participants have all of the key information for their next steps within instant reach.

- **Optional:** morning and evening news, celebration: for Open Space events that last several days the facilitator can announce short meetings for the entire group each morning and evening. This time is for communicating important factors, for example new workshop topics that have been added by individual participants, or for telling the stories of the day after a long day in the Open Space. It is important that only facts and experiences are reported. The plenary sitting is not a forum for discussion. If there is enough space, time and resources then the end of the Open Space could be marked with a small celebration. It is more than enough to organise a sound system, a few instruments or games placed in a corner, and some drinks and refreshments – this will allow for a comfortable, shared and intimate end where the participants take the lead.

Structure

Self-organisation in the Open Space is based on a structure that makes it possible for productive action and (new) order to emerge out of chaos and confusion, possible conflicts, numerous different opinions, ideas and sometimes even aimless discussions. In order for this to work, all of the participants have to be prepared to focus their behaviour on the following four principles, one 'law', two so-called phenomena, and one important exhortation.

The four principles

- **'Those who are present are just the right ones'**: It does not matter who did not have the time or interest to attend. As a participant I will concentrate completely on my interactions with those that have come and will not waste any energy on people who cannot or did not want to be here.
- **'Whatever happens is the only thing that could have happened'**: It does not matter what could, should, or ought to have happened. Only what actually did happen is important. This is what I will concentrate my engagement on in the Open Space.
- **'It will start when the time is right'**: Innovations, ideas and creativity do not go by the clock. You generally cannot plan something new. You have to 'discover' it. This requires patience and perseverance. You should also be prepared for there to be longer periods in the Open Space where nothing happens.
- **'When it's over, it's over. When it isn't over, it isn't over'**: I am personally responsible for my time in the Open Space. This means, for example, that if everything has already been said after half of the time planned for a work group then it is time to end the session. The reverse is also true: if 60 minutes have been spent in a work group and it is just beginning to get exciting, then you should immediately meet again to continue the work.

- The **'law of two feet'** states: if you ever find yourself in a situation during the Open Space where you cannot learn or contribute anything, then use your two feet and go somewhere that is better for you. This has a very good side effect: all chatter boxes, know-it-alls and jack-of-all-trades will usually shut up quickly when they notice that the participants are heading off somewhere else.

Two **'phenomena'**

- **'Bumblebees'**: 'bumblebees' will emerge in the Open Space once everyone has taken the 'law of two feet' to heart. Participants will move freely to and fro between the separate work groups. Just like their nickname in nature, they are fulfilling an important function by doing this: they are cross-pollinating different groups with their insights, questions or ideas.
- **'Butterflies'**: these little Open Space 'animals' are like their natural role models. They are pretty. To be pretty you do not have to do much. In Open Space, 'butterflies' are people who do not know precisely where they should be, or who simply want to stay put in a non-organised place for a while. You can find them at the buffet or outside by the door in the sun. As they do this, they open up space for unplanned discussions and new insights that, in hindsight, may go on to influence the course of the entire event. This is why 'butterflies' are important. System theory has a name for them, although it is not quite as pretty as 'butterflies': centres of inactivity.

- An **'exhortation': 'Keep your eyes open and expect to be surprised!'** This exhortation should remind us that we will have little space for something new if we go into the Open Space with preconceived, unchangeable opinions or concepts. For the duration of the Open Space simply leave your old truths at home. There will then be space for surprising insights and new, exciting contacts.

DAY-TO-DAY SUPPORT

The role of the facilitator

Open Space is simple but not easy. This is a sentence that you will often hear, especially from experienced Open Space facilitators. Although in the course of the Open Space you may sometimes meet the facilitator putting chairs back in the right place or clearing away dishes, you shouldn't get the wrong impression. This is part of the practice and gives the facilitator an opportunity at the same time to observe the extent to which the Open Space rules are being kept.

Open Space creates an intentional tension between completely self-organised openness on the one hand, and the aspiration to advance in a focussed way a specific topic that is very important, perhaps even of existential importance, to an organisation or company. In particular the facilitator, as a representative of all those involved, has to pick up on this tension and perhaps even intervene if someone 'loses their nerves' in the circle of participants because the entire event seems to be running in a much too unstructured way. An Open Space facilitator must be able to deal with both positive feedback ('I have never worked together so productively with my colleagues!') and negative feedback ('That is cheaply earned money! What do you actually do apart from standing around here?'). The facilitator must never lose their focus on the 'openness of the room' during the Open Space. This is the only way that the Open Space will work, and experienced facilitators who have already accompanied numerous Open Space conferences will be especially aware of this. For example, they will use their authority at just the right moment and will ensure that the conditions remain in place for the self-organisation of the entire group. It works best if Open Space guides are equipped with very good people skills and are able to productively deal with different emotions.

Can you also carry out Open Space with a facilitator from within the organisation? This is possible in principle, since the Open Space method is easy to understand and implement. If you are dealing with a particularly important topic, for example a comprehensive restructuring of your organisation, then we recommend relying on an external consultant initially. If you would like to implement the method in the long term within your organisation, then it is good to train up several members of your organisation in it. You will be able to observe a lot during the first Open Space conferences that are still accompanied by external facilitators, which will mean that it will no longer be difficult to pick this up later with internal staff.

Under no circumstances should the Open Space be moderated by one of the leaders, even if this leader is already very familiar with the methods. The formal management team of a company or an organisation, as well as the employees, will always gain the most from an Open Space event if the formal leaders take part as normal participants. Leaders that take this to heart will say things like this: 'It is almost like a holiday for me today. But there is still so much going on everywhere!'

What should leaders do in the Open Space?

It is important in organisations where self-organisation was previously practiced little or not at all that the leaders in charge aggressively support the event's format and, for example, actively communicate on eye level with employees, interns, trainees and all other participants. You can be sure of one thing: the way that the leaders behave will be scrutinised by all other participants. It will be anything but easy for the leaders to hand over responsibility and to 'normally' join the ranks of everyone else in the groups of participants. After all, they have spent the majority of their professional lives in positions of responsibility and have become used to accepting responsibility and deciding how things should proceed.

In addition to this, leaders in particular will be keenly aware of the scepticism that is at least implicitly present in the room about the new Open Space methods. They are not even sure themselves if it will work. It could not be any other way. As humans we have only rarely experienced anything taking place without a hierarchy in the structures that have impacted us most (family, school, education, workplace). Why should we unreservedly believe that this can be any other way in the Open Space situation? Most people are unable to imagine themselves in a world without hierarchies. Historically it has not been long since the same could be said of the estate-based society of the Middle Ages in the feudal period: for our ancestors it was inconceivable that anyone would be able to leave the strict confines of his class within his lifetime. There are lots of things that seem to be impossible in the short term, and yet become the new normal in the middle and long term. This is why only the foundations of a genuine process of change can be laid during the course of a two-day Open Space conference. In the course of the six months after the conference, however, much more can take place.

When is Open Space not suitable?

Open Space is not the right method in the following situations:

- If the leadership of the organisation would most likely block the implementation of the results.
- If the leadership of the organisation is not really interested in the participation of the participants that have been invited and is really only conducting the Open Space to signal an openness that they are however not (yet) actually ready for.
- If the Open Space is primarily being conducted as a motivational event for the workforce.
- If predefined goals and strategies are already all lined up and the Open Space is just being conducted as a platform for communicating these.
- If it 'only' about conveying information.
- If there are foundational or serious conflicts in an organisation. Open Space is able to deal with conflicts, but it is not a method of mediation.
- If it is obvious to everyone what needs to happen next and what the best solution is. Or to put it another way, in situations like this: 'When the tap is dripping, we call the plumber.'

In what cases is Open Space particularly well suited?

Open Space is particularly well suited to complex situations where the expertise of as many different people as possible is an advantage. This is especially the case when a new strategy needs to be developed or also when a new product needs to be launched. The Open Space format is equally well suited with different steps of implementation, for example when a newly defined strategy needs to be determined, coordinated and set into motion.

Why a circle? Does it have to be like that?

Yes, the circle is important. Remember: important things happen in a circle. It is not for no reason that we call it a 'circle of friends'. The circle symbolises the absence of 'top' and 'bottom' in a way that no other Open Space element does. In a circle we are all equal and can hear and see all participants well.

Keep it simple, stupid!

In general, it is important to focus on what is essential. You will need a suitable room, enough time, an exciting topic, the right people and good refreshments. Everything else will take care of itself. You do not need much technology for Open Space. An exception to this is if you are organising an online Open Space, which could also be a sensible format for the event and for your organisational development given the necessary technical provisions (fast internet and appropriate conferencing or coworking software).

Can you use Open Space in your day-to-day work?

If you have successfully experimented with the Open Space method for a while, then you should think about whether you will integrate the Open Space principles into your normal day-to-day work. Open Space is possible every day. It is best to pursue this direction one step at a time. Its implementation is particularly dependent on the approach of all those involved: leaders should practice, for example, only doing themselves what is absolutely necessary. This will automatically give all others in your organisation more room to assume responsibility. You can be sure that there will be surprises!

RESOURCES

Open Space was 'discovered' by Harrison Owen. The procedure is freely available.

You can find a short introduction from Harrison Owen here: 'A Brief User's Guide to Open Space Technology'. This text also includes a good example of an opening speech that an Open Space facilitator could use at the start of the event to explain the Open Space format: https://openspaceworld.org/wp2/hho/papers/brief-users-guide-open-space-technology/.

Owen, Harrison (2012): Open Space Technology. A User´s Guide; Third Edition; Berret-Koehler.

Mezick, Daniel et al. (2015): The Open Space Agility Handbook; New Technology Solutions.

Internet resources on Open Space: https://openspaceworld.org/wp2/

Video: Open Space Technology - The most engaging all-company meeting:
https://www.youtube.com/watch?v=WQj12jmLGr4

#open space #self-organisation #agility #innovation

06 Team Canvas

T Together
E Everyone
A Achieves
M More

'If you want to go fast, go alone.
If you want to go far, go together.'
(African Proverb)

Benefits

When is Team Canvas useful?

→ When you want to set up a team and jointly determine the way of working together or you want to boost alignment within a team.

→ When you want to create an effective working team, whether remotely or in person or hybrid.

→ When you want to improve the identification with the team goals in a team.

→ When you want to increase trust, mutual understanding, and teamwork.

→ When you want to discover the interests of a team, making it easier to meet the expectations of team members.

→ When you are kicking off a new project.

→ When a new team member is joining a team.

→ When conflicts are arising but it's hard to find out why.

→ When you want to be aware of the many different forces influencing your team's performance in a short time.

From practice

Anna is a project manager and is older than her team members. She put a lot of effort into studying the differences between generations to create a working environment that supports their potential and goals. She still felt disconnected from her team members, however.

After a year, she stopped assuming what her colleagues' needs were. Instead, she chose a new approach: She created a canvas with her team. During the 45 minutes sessions she got to know the needs and expectations of her colleagues. She could efficiently diagnose which values they shared and which they didn't. Together they defined the strengths and weaknesses of the team from the ground up. They talked about their understanding of their roles - both formally and informally.

When asked what she appreciates most about this tool, Anna says that it gave her clarity. When they didn't take the time to talk about these issues in the team, they found that it affected their work. Often, unfortunately, this erupted in the form of conflicts. Her team members also like this tool. They say that it is energetic, engaging and conducive for better teamwork.

In a nutshell

As a leader, there is no doubt that you will more than once have experienced moments when you needed to bring team members together, talk about their goals, motivations, values and how they fit into an overall vision of, for example, a project or an organisation. In the rush of daily operational tasks, it is easy to forget that in teamwork the things you talk about least matter most. Team Canvas is a free tool that will allow you to have a structured conversation about crucial topics and to gather your findings on a single piece of paper. Stock up on plenty of coloured sticky notes!

Team Canvas is a tool designed for teamwork. With this tool you will be able to see in a short time how your team understands its:

- Goals
- Roles and skills
- Purpose
- Values
- Rules and activities

Team Canvas allows you to align your vision and to see your team's real needs and aspirations beyond what is formally written in the organisational structure. It reduces the potential for future conflicts and supports the resolve of your team in their work routines. Team Canvas is an excellent tool for both in-person and remote working.

Team Canvas Basic

The most important things to agree on to start an efficient team project and get to know the members better.*

Name of the team | **Date**

Goals

What you as a group really want to achieve?
What is our key goal that is feasible, measurable and time-bounded?

What are our individual personal goals?

Roles and skills

What are our names?
What skills and strengths do we have on board of our group?
What comosition of roles would help us to get where we want to be?

What are we called as a group?

Purpose

Why we are doing what we are doing in the first place?

Values

What do we stand for?
What are our guiding principles?
What are our common values that we want to be at the core of our team?

Rules and activities

What are the rules we want to introduce after doing this session?
How do we communicate and keep everyone up to date?
How do we make decisions?
How do we execute and evaluate what we do?

* To download the pdf version, go to: https://theteamcanvas.com

INSTRUCTIONS

The following instructions have been created by the authors of the Team Canvas tool:

Prepare team facilitation

Duration time: 30-45 minutes

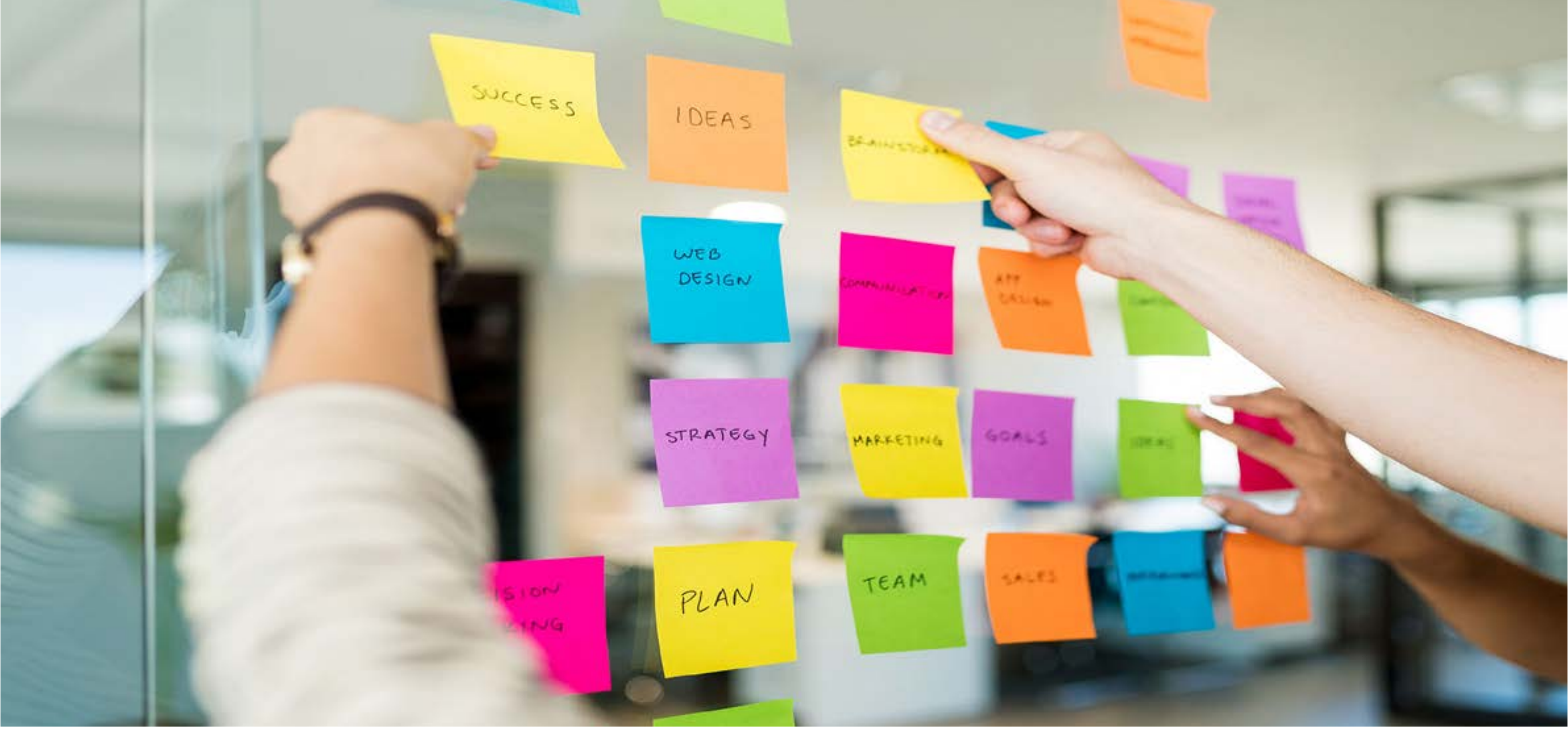
Materials:

- Team Canvas Basic recreated on a whiteboard, or a big enough piece of paper (e.g., flipchart paper or A0/A1)
- Blocks of sticky notes, one for each participant, different colours
- Sharpies or pens to write on stickies - use thick enough pens so everyone can see the writing
- A device with a timer function

Running the session

Introduce the Team Canvas as a tool to align the team members and better understand your team's goals, roles, and values.

Go through each step with the team, making sure you ask the questions (see below) for each segment. Encourage people to write their answers on stickies and talk about them with the team. Make sure that you agree on all fields. Use a timer for each step to apply some time pressure, so the team focuses on getting to the point in each section discussion. If some conversations take a relatively long time or seem to touch upon more significant issues, consider parking these questions then during the Team Canvas session and plan a separate meeting to address them specifically.



1. Goals [5 minutes]

Ask the team members to agree on common goals and mention their personal goals for the team, e.g., in a project.

Questions:

- What do we as a group want to achieve?
- What is our key goal that is feasible, measurable, and time-bounded?
- What are the personal goals that we want to share within our team?

Examples:

- A: In two years, switch our education business completely to online services.
- B: In five years, become the leading bike sharing company in our region.
- C: Open an 'unpackaged' shop in our neighbourhood in one year.

2. Roles & Skills [5 minutes]

Ask people to put their names on stickies, as well as their roles. If a person has multiple roles, use separate post-its.

Questions:

- What are our names?
- What skills and strengths do we have on board of our group?
- What composition of roles would help us get where we want to be?
- What are we called as a group?

Examples:

- Example A:
  - Max: CEO
  - Martina: Training advisor
  - Fabienne: Training advisor
  - Sascha: Expert for online learning
  - Michaela: Marketing expert
  - Name of the team: Task force online learning
- Example B:
  - Lisa: Managing director
  - Ben: Marketing expert
  - Alina: Expert for customer communication
  - Maja: Programmer
  - Lars: Bike management
  - Lena: Management of reparations
  - Name of the team: Bike now!
- Example C:
  - Monika: Food management
  - Andrea: Facilitation management
  - Marc: Salesman and innovation management
  - Eva: Saleswoman and marketing
  - Name of the team: Future of shopping

3. Purpose [10 minutes]

Ask the team to go one step beyond their common goal and to explain why they do what they do.

Questions:

- Why are we doing what we are doing in the first place?
- What is the most important thing that makes us pursue our common goal?

Examples:

- A: Positively influence people's lives through educational innovation.
- B: Integrate the bike as a way of transport more strongly into our society to increase awareness of sustainable mobility.
- C: Contribute to the sustainable use of food in our society.

4. Values [5 minutes]

Ask the team what the core values are - the most important principles - that they want to share within the group. The team should agree on values, so everyone accepts the final set.

Questions:

- What do we stand for?
- What are our guiding principles?
- What are the shared values that we want to be at the core of our team?

Examples:

- Trust
- Creativity
- Quality
- Transparency
- Mutual understanding
- Equality
- Respect
- Integrity
- Accountability
- Responsibility

5. Rules & Activities [10 minutes]

Ask the team to agree on standard rules and activities. Please think of this as of outcome of the previous sections: a concrete set of rules and activities they want to implement.

Questions:

- What are the rules we want to introduce after doing this session?
- How do we communicate and keep everyone up to date?
- How do we make decisions?
- How do we execute and evaluate what we do?

Examples:

- Keep things confidential within the group
- Weekly status updates
- Communication over Teams, Slack and Skype for calls
- Dinners together every second week (Max as organiser)
- Workday: starting from 9 to 10; meetings begin at 10
- Keeping workdays to 8 hours. Exceptions are possible but should be communicated within the team.

6. Wrap up [5 minutes]

As you close a Team Canvas workshop, ask the team members to talk about one most crucial insight they gained during the workshop.

It is recommended that you repeat the Team Canvas session with each new member joining the team.

Example of a completed Team Canvas*

Name of the team Task force online learning **Date** 11 April 2022

* Source: http://theteamcanvas.com/learn/

DAY-TO-DAY SUPPORT

The authors of Team Canvas allow you to make whatever modifications you choose. Do not use the tool unreflectively. Things worth considering:

- What do you want to achieve by using this tool?
- What do you want to reveal?
- What dimensions of teamwork are you interested in?
- What impact could work with Team Canvas have on the work in your team?

Once you have answered these questions check if you want to change any of the canvas fields.

When facilitating a team, think about your role - do you act at eye level with the participants or not? Are you involved in the production of content? Ask yourself how you want to act when you have different hats on.

The tool requires a time limit. It may seem that limited time restricts creativity, but quite the opposite is true. Extending the time does not add much value. Instead, it can lead to boredom. Keep track of time by working with a stopwatch, for example.

The value that the Team Canvas will bring depends on the conclusions you draw from it. You can go further by asking questions like:

- What does this picture say about our group?
- What are the risks involved?
- What do we have in common?
- How will this affect our work?

There is an extended version of the Team Canvas which includes: personal goals, needs & expectations, strengths & assets, weaknesses & risks. When working with this extended version, schedule between 90 and 120 minutes.

Team Canvas - extended version*

Name of the team:

Date:

People & roles

What are our names and the roles we have in the team?

What are we called as a team?

Common goals

What you as a group really want to achieve?
What is our key goal that is feasible, measurable and time-bounded?

Values

What do we stand for?
What are guiding principles?
What are our common values that we want to be at the core of our team?

Rules and activities

What are the rules we want to introduce after doing this session?
How do we communicate and keep everyone up to date?
How do we make decisions?
How do we execute and evaluate what we do?

Purpose

Why we are doing what we are doing in the first place?

Personal goals

What are our individual personal goals?
Are there personal agendas that we want to open up?

Needs & expectations

What does each one of us need to be successful?
What are our personal needs towards the team to be at our best?

Strengths & assets

What are the skills we have in the team that will help us achieve our goals?
What are interpersonal/soft skills that we have?
What are we good at, individually and as a team?

Weaknesses & risks

What are the weaknesses we have, individually and as a team?
What our teammates should know about us?
What are some obstacles we see ahead us that we are likely to face?

* To download the pdf version, go to: https://theteamcanvas.com

RESOURCES

The authors of team canvas are Alex Ivanov and Mitya Voloshchuk. The tool was inspired by Business Model Canvas, created by Alex Osterwalder. Team Canvas is distributed under CC BY-SA 4.0.

More information can be found on the authors' website: http://theteamcanvas.com.

Depending on the goal you want to achieve, you can use different canvases. You will find lots of inspiration, especially for remote work, and ready-made layouts on the following websites:

- Miro: https://miro.com/miroverse/
  Diversity Canvas: https://miro.com/miroverse/diversity-canvas/,
  Hybrid Culture Canvas https://miro.com/miroverse/hybrid-culture-canvas/ or
  Online Team Collaboration Canvas
  https://miro.com/miroverse/online-team-collaboration-canvas/

- Mural: https://www.mural.co/templates
  Consumer Trends Canvas: https://www.mural.co/templates/consumer-trends-canvas or
  Social Business Model Canvas:
  https://www.mural.co/templates/social-business-model-canvas

#remote work #team canvas #canvas

07 Golden Circle

'People don't buy what you do;
people buy why you do it.'
Simon Sinek

Benefits

When is golden circle useful?

→ When you want to make your organisation's mission and vision transparent and well understood by all.

→ When you want to create a basis for shared organisational change.

→ When you want to define **'what'** your organisation does, **'how'** it does it and **'why'** it does what it does.

→ When you want your team to understand the specific role of your organisation in a competitive market.

→ When you want to work with people and for people who share your values.

From practice

'Hi, we're Apple. We make great computers. They're beautifully designed, simple to use, and user-friendly... Want to buy one?' *

You've probably never seen Apple communicate like this, although many companies in the marketplace do. They tell you what they produce and the benefits of using their solutions, services or products.

Steve Jobs was a well-known visionary. Analysing his speeches, both those at Apple and the Pixar Animation Studio, one can see that he placed much more importance on communicating why he does what he does than on the products themselves. The way Apple communicates is:

'Everything we do, we believe in challenging the status quo; we believe in thinking differently. The way we challenge the status quo is by making our products beautifully designed, simple to use and user-friendly. We just happen to make computers. Want to buy one?'

Look at the structure of the statement:

'Why': Everything we do, we believe in challenging the status quo; we believe in thinking differently.

'How': The way we challenge the status quo is by making our products beautifully designed, simple to use and user-friendly.

'What': We just happen to make computers.

This non-obvious and non-intuitive way of communicating invites people to connect to the vision, attracts people with similar values and creates loyal customers without communication based on manipulation. As Simon Sinek says, this way of putting 'why' on first place in communication with customers and the market stays behind Apple's success.

* From the book 'Start with why. How great leaders inspire everyone to take action' by Simon Sinek (see Resources below)

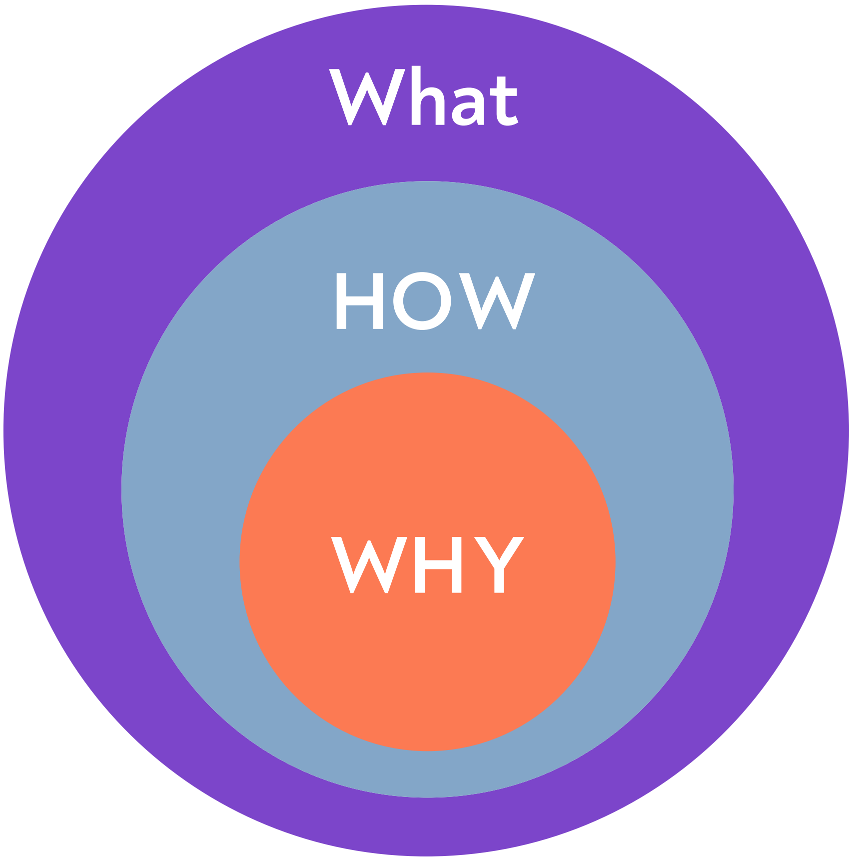
In a nutshell

The Golden Circle is a method that helps you define your company's mission, vision, and competitive advantage. By communicating according to the rules of the Golden Circle, you will attract talented people who want to commit to making your vision a reality. You will create a loyal customer community that shares your values. With this method, you will be able to inspire and engage people without resorting to manipulation.The Golden Circle approach defines the three steps of effective argumentation. Whether you want to open a new business, increase market share or convince a team to make an organisational change or engage in recent activity, - start by answering 'why'. Then indicate 'how' to achieve it and, at the end of the message, point out 'what' the solution is.

This method is effective for communicating with the market and within your organisation. It can be used for changes on a large scale or in ordinary situations.

Note that in a rapidly changing, unpredictable world, the key is 'why' we do what we do. The ways and solutions ('how' and 'what') can change.

Golden Circle: Why? - How? - What?



1. Inner circle: 'why'? Here you build motivation and point out the reason behind what you do.
2. Middle circle: 'how'? Here you show the way your reach your goal(s).
3. Outer circle: ‘what’? Here you indicate what the result is.

INSTRUCTIONS

Think of a goal you are working towards or a vision you want to realise. Maybe you are wondering how you can become an inclusive leader? Or you want to lead your company through digital transformation? Maybe you want to open up new markets together with your team? Take a moment and write down your goal as you would currently define it. It can be general but also specific. Then work on your topic according to the principles of the Golden Circle.

While preparing the message, focus on the three consecutive circles, starting from the centre and moving outside. It is essential not to change this order.

Circle 1 'why'

- Why is what you want to achieve so important?
- What do you believe in? / What values do you want to incorporate?
- Why is it worth doing this?
- What is the point of doing this?
- Why are you seeking this?
- What is the deeper meaning behind what you want to do?

Circle 2 'how'

- How do you want to achieve these aspirations / vision / goals?
- What principles do you want to follow?
- What attitude do you want to have?
- What are the preferred courses of action?
- What methods do you want to use?

Circle 3 'what'

- What is the outcome?
- What is the expected / visible result?
- What is the solution?
- What product, outcome, and service will result from this work?

Golden Circle in the organisation

We recommend that you implement Golden Circle in two phases: first on the team level and then on the organisational level. This is just a recommendation. The method will also work if you apply it directly on the organisational level.

Regardless of whether you are working on the level of the team or the organisation: define your topic, explain the Golden Circle method and begin.

Team Level

Duration: roughly 1 hour

- Work in pairs and start by everyone answering for themselves the three Golden Circle questions detailed in the process outlined above. If meeting in person, use a flip chart and facilitation cards, for example. If meeting online, use suitable software to visualise your results (cf. 'Remote Work' in this chapter). Limit your time to three times three minutes.
- One of the two participants should then present their results. Co-workers should pay close attention and should not interrupt or ask questions. The message should be clearly communicated in three minutes.
- After this, the listeners will repeat back what they understood the speaker to be saying for the 'why', 'how', and 'what'.

The content and any potential ambiguities will be clarified in a group discussion. Those presenting their ideas will use this discussion to improve or re-formulate their answers to be more concise. Plan 20 minutes for this step.

- Finish by swapping roles and repeating the exercise.

Organisational Level

Duration: roughly 2 hours

We recommend carrying out this exercise with as many people as possible – if possible with everyone in your organisation. Form groups of 8 to 12 people at most. These groups will carry out the exercise in isolation from each other. They do not have to do it at the same time.

- Select one person to take you through the process and find a way to visualise the results, regardless of whether you are working online or offline.
- Start by forming work groups of 4 people at most who will answer the three Golden Circle questions in the way outlined above. Ask the groups to visualise their results.
    - Each member of the group will start by answering the three questions for themselves and will visualise this on a shared flip chart or with the appropriate software. They can all be doing this at the same time. Restrict the time to three slots of three minutes.
    - The group will then have 20 minutes to agree on a joint conclusion.
- After this, the group results will be presented to everyone. Each group will have three minutes to present their answer without interruptions.
- This will be followed by a conversation, where the different opinions can be discussed (30 to 45 minutes). Tip: spend time in advance deciding on a method for

bringing the group to a shared answer. This may be by weighting the individual answers, for example, where all those present are equally involved.
- At the end, all those involved will think about how and to whom the result will be communicated.

If you carry out this exercise with several groups of up to 12 participants in your organisation, then you will need to finish by inviting delegates from each group to work together on a shared result.

Who is involved?

Think about the key stakeholders you need to involve in making your vision or goal a reality. This could be customers, executive team members, your own team members, suppliers or others.

Write down who your three most important stakeholders are. Consider how to convey them the idea you are working on according to the Golden Circle rule. What will this message sound like? How is this similar, and how is this different to your previous communication?

DAY-TO-DAY SUPPORT

Start with 'why'!

It is not enough for your message to contain all three parts. The order of the questions is crucial. Always start with the 'why'.

Remember, it is customary for leaders to focus on the outer circle: what is to be done? This message refers to the logical, analytical part of the brain. This makes the audience understand the issue. However, understanding alone does not include motivation to act. Activating motivation requires the involvement of a more original part of the brain called the limbic system. The question 'why' refers to the sense and meaning of the proposed action and thus inspires the motivation to act.

The Golden Circle is not a magic formula that will completely convince the audience of your vision. The strength of this tool is the way that it engages precisely those people who identify with the same values that you do.

How to avoid the 'why' trap

It is easy to fall into the trap of giving a superficial answer to the 'why'. It is best to ask the 'why' question again and again to get to the bottom of the deeper 'why' of an activity or attitude. Do not be satisfied with the first answer to the 'why' question. Take your time and accept the silence or emptiness in your mind.

The Five-Why-Method supports you in identifying the core of your 'why'.

An example of how to apply the Five-Why-Method:

Lena works in an educational institution. When asked why she works there, she answers to earn money. Money can be earned from many activities. So, why choose this education provider? Because the educational programmes are interesting, and they support people and societal organisations. Why? Because the offers enable the participants and their organisations to grow further, to strengthen their resilience and thus to do good work. Why is this good? Because this contributes to a healthy, resilient and democratic civil society. Why is this important to Lena? And this is the core of the 'why': Lena wants her work to make exactly this contribution to society.

It is worthwhile applying the Golden Circle in the step-by-step implementation of the INCLUDE approach and to work with this method, among others, during an Open Space for Leaders (cf. method 'Open Space for Leaders').

RESOURCES

The author of the method is Simon Sinek.

Recommended reading:

Sinek, Simon (2011): Start with why. How great leaders inspire everyone to take action, Portfolio.

Other interesting resources:

The TED Talk by Simon Sinek from 2009 is an extremely useful introduction to this method: How great leaders inspire action:
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.

Steve Jobs: Think different / Crazy ones speech:
https://www.youtube.com/watch?v=keCwRdbwNQY

Five-Why-Method: 5 Whys Template: https://miro.com/templates/5-whys/

#golden circle #vision #mission

08 Remote Work

'Art is the elimination of the unnecessary.'
Pablo Picasso

Benefits

When is the 'remote work' tool especially useful?

- When you want to efficiently organise a remote team's work and to avoid the typical pitfalls associated with virtual collaboration.
- When you want to establish an effective communication design in a team to facilitate cooperation.
- When you want to choose the right tools to facilitate communication and workflow in a team.
- When you want to improve the motivation and integration of remote team members.

From practice

Stefan has always been good at building teams. He is a charismatic leader who knows how to attract others and how to win allies. He has an inner warmth which spreads to those around him. He is close to people and their problems, and his office door is always open for them. He deals with many issues informally over lunch or in the hallway.

The problem is that Stefan leads a hybrid team. What works for him in face-to-face communication with those who work in the same office does not translate to his relationships with remote workers. For Stefan, the quality of interpersonal contact is essential. He likes to maintain eye contact with his colleagues, and this gives him a good rapport. However, his team members often use different excuses to not turn on their cameras during video conferences. This makes him uncomfortable. He begins to believe that something is wrong in the team.

To take one example: what is perceived as a fiery motivational speech in the office is criticised as a lengthy monologue in the virtual world. This is why Stefan is particularly concerned with open communication. He wants to be accessible to his team members, regardless of their position in the hierarchy. He has never liked leaders who only work behind a desk and at a computer. His office door is always open, and he often visits his colleagues at their workplace.

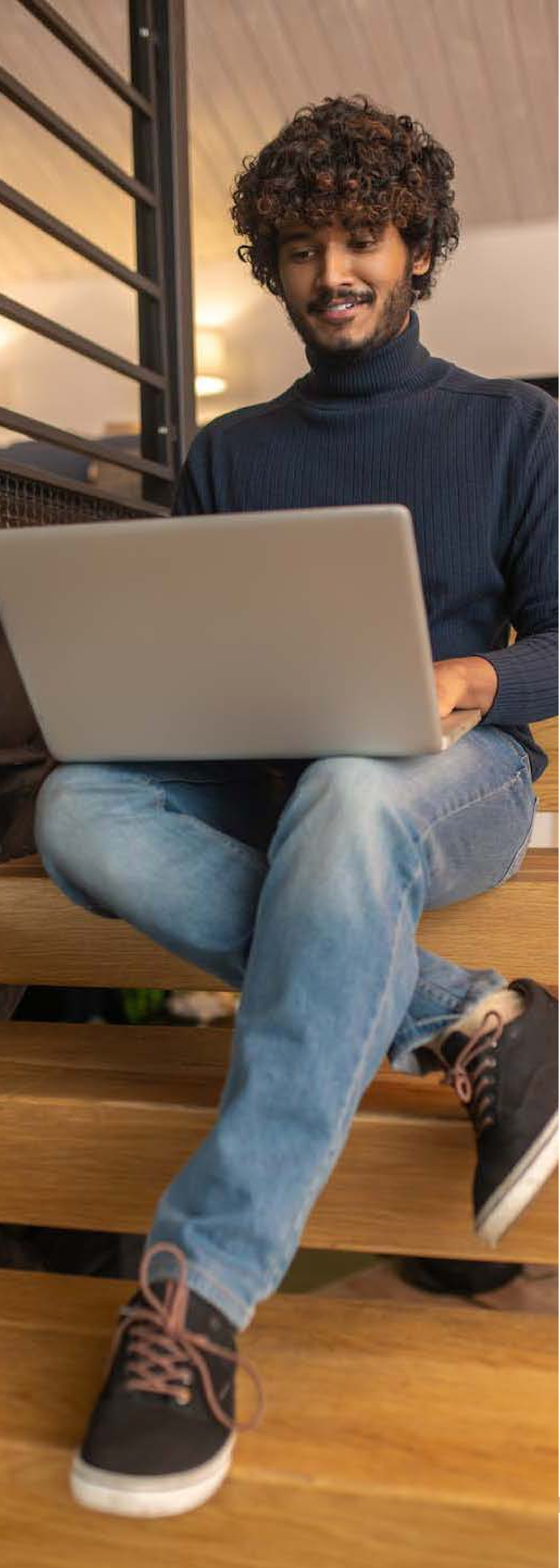
What he does not realise is that his mailbox is the 'door' through which the field staff contact him. This door is usually 'closed' at Stefan's workplace. This has led remote team members to feel as if Stefan's approach favours those who work directly with him in the office.

Stefan realises that a problem exists, but he does not know that the remote team members feel that they are being discriminated against. Stefan also realises that he does not yet understand the virtual world well enough. He can solve technical problems remotely, but he does not know how to build trust, contact others and build a team spirit remotely, or how to achieve higher overall productivity through better online collaboration.

In a nutshell

In order to function properly, every team needs a vision, a goal, clear communication, a clear structure, clear roles, established rules of cooperation and a sense of belonging. Remote teams are the same as in-person teams. In virtual, geographically dispersed teams, it is impossible to meet these needs with the same tools that work well in groups who are physically working together.

Working remotely allows teams to work together and achieve their goals, even when the members are in different geographical locations or even in different time zones. This allows your team to include talented individuals from



all over the world. You can maintain business continuity in situations such as a pandemic and reduce the cost of running your business. Remote work requires a different approach to organising people, nurturing motivation and creating a team spirit than work done in a shared physical space. This applies specifically to:

- Choosing a common work platform that promotes collaboration and productivity.
- Organising work (availability, working hours, division of roles).
- Establishing rules for communication (in groups and one-on-one).
- Leading the team in the virtual world, including development, motivation, and integration.
- Being sensitive to the difficulties generated by the digital world, including the danger of exclusion and the risks to the mental health of team members as a result of isolation.

back

INSTRUCTIONS

The instructions consist of five sections.

The **first part** will answer the question **'Which remote working tools support collaboration and productivity?'** and will suggest which popular software tools can be used for remote working.

In the **second part,** entitled **'How do you set the rules for team communication?'**, you will find tips on which rules are helpful for working together remotely when your team is not only spread across different locations but also different time zones.

The **third part**, entitled **'How to influence the motivation of team members'**, will explain how to tackle issues of motivation in the remote world.

The **fourth part,** entitled **'How to resolve conflicts'**, will show which conflicts can arise due to misunderstandings in remote workplaces and how these can be resolved.

The **fifth and final part**, entitled **'How to ensure a sense of belonging in the team'**, will show you how to increase everyone's sense of identification with the team and how to make all employees feel involved, even if you are unable to meet them in person.

1. Which remote working tools support collaborative and productivity?

Communication and teamwork

MS Teams
www.microsoft.com

Teams is a solution from the Microsoft family. The program allows you to conduct teleconferences, screen sharing, divide to work in parallel rooms, conduct group chat, exchange files, and run separate topic channels for different teams and projects. In addition, MS Teams enables collaborative work on documents.

View as well: mural.com; jamboard.google.com (digital whiteboard from Google, available for G Suite's users).

Miro
www.miro.com

Miro offers digital boards that allow teams to cooperate visually. Miro makes it possible for you to conduct meetings and workshops - including video and audio features. It offers a range of ready-to-use tools such as collaborative whiteboards for team integration, brainstorming, process mapping, strategy and planning, and R&D, to name just a few.

View as well: mural.com; jamboard.google.com (digital whiteboard by Google, available for G Suite users).

Slack
www.slack.com

Slack is a platform that brings all of your team's communication together into one place. The goal is to get faster responses, so you are not wasting time sharing documents or knowledge. Slack allows you to organise chats, video conferences, and topic channels, as well as to send messages and files. It reminds you about events and organises communication by setting up threads - team members decide if they want to follow a thread or not. The goal is to reduce the number of emails being sent, to avoid duplicate responses to questions, to share knowledge, and to speed up answers from fellow team members. The application can be integrated with, e.g., Trello, Asana, Google solutions and around 3,000 other applications.

View as well: rocket.chat; hangouts.google.com; twist.com.

Worth viewing: discord.com (a platform for gamers to communicate, which is now also used in distance education and business contexts).

Video conferences and workshops

zoom
www.zoom.com

Zoom is one of the earliest and most popular platforms for conducting video meetings and webinars. It offers key options for engaging participants, e.g., with room divisions, surveys, opportunities to share opinions, and the possibility for working with whiteboards.

View as well: clickmeeting.com; join.me; corp.kaltura.com; gotomeeting.com.

Data sharing

Google Drive
www.drive.google.com

Google Drive is a shared space in the cloud for storing, synchronising, and sharing files. This software allows teams to work on the same documents simultaneously or asynchronously.

View as well: dropbox.com; egnyte.com; onedrive.com.

File management & storage

Evernote
www.evernote.com

Evernote is an application that collects ideas, inspirations, articles, contacts, emails and much more in one place. It allows you to create a repository of knowledge. The system of creating memo books and tagging content will enable you to quickly get to the information on a relevant topic whenever you need it. Evernote also allows you to share content with other colleagues. The app's strength is its integration with, among others, Asana, Trello, MS Office, Google, Dropbox, Slack, Miro, Todoist, Pinterest and many others.

View as well: hugo.team; keep.google.com; zoho.com; onenote.com.

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Transferring large files

WeTransfer
https://wetransfer.com

WeTransfer allows you to transfer large files for free. The business version will enable you to transfer, store data, and protects your data transfer with a password.

Project Management

Asana
www.asana.com

Asana is a platform that supports agile management. It is used to manage projects, work-flow, productivity, working time, and calendars. It connects marketing, sales, operations (processes), and product development. It comes with the possibility of integration with Slack and Microsoft solutions. Differentiated packages with the possibility to adapt to the needs and the number of members of the remote team are offered.

View as well: trello.com; monday.com; clickup.com; podio.com; teamwork.com.

Time management

World Time Buddy
www.worldtimebuddy.com

World Time Buddy is a world clock, time zone converter and online meeting planner in one. This tool facilitates communication and cooperation between teams working in different loca-tions across the globe and allows you to set up shared working hours.

Calendly
www.calendly.com

Calendly eliminates the tedious communication usually required to find out when a contact is available to meet. The partner receives information about available dates and chooses a convenient time with guaranteed availability through the link. Calendly's strong point is its integration with other tools like Google, Salesforce, HubSpot, Mailchimp, Zoom, MS Teams, GoToMeeting, Slack, or payment systems like PayPal or Stripe. When a meeting is scheduled, a link to the remote session is automatically generated.

Toggl
www.toggl.com

Toggle is a time management application that helps you track and report on time spent on individual projects and tasks (time tracking).

View as well: gettimely.com.

Productivity

Todoist
www.todoist.com

Todoist is an application that allows you to create to-do lists and prioritise tasks. It reminds you of scheduled tasks, will enable you to create labels, and will assign tasks to projects. It is integrated with all the user's online devices. The team version allows you to plan projects, assign tasks, set deadlines, share files, and monitor work progress..

ZenKit
www.zenkit.com

Zenkit is an integrated system for task management, team discussions, knowledge creation and sharing, and project management. .

Any.do
www.any.do

Any.do is an app for creating to-do lists, scheduling work and setting reminders. Among other things, it allows you to turn WhatsApp messages into tasks and reminders using natural language software.

Workflow and digital signature

SignNow
www.signnow.com

SignNow is a system for developing and concluding contracts online. The program automates contracting and document flow.

View as well: esignatures.io; Adobe Sign (adobe.com/sign), eversign.com; hellosign.com.

Systems integration - Workflow automation

Zapier
www.zapier.com

Zapier facilitates collaboration between different systems and applications. It even connects even applications that are not yet integrated and automates the transfer of information between them. Taking action in one application triggers actions in other applications. For example, receiving an email message with an attachment automatically saves it to the Dropbox drive. The developers claim to have integrated more than 3,000 applications. The most common integrated applications are Google Ads, Gmail, Trello, FreshMail, PayPal, Stripe, Discord, Instagram, YouTube, Facebook, Zoom, MS Outlook, Salesforce, Gravity Gorms, Airtable, ActiveCampaign, Asana, Pipedrive, ClickFunnels, Twitter, and Mailchimp.

2. How do you set the rules for team communication?

Communication is the heartbeat of an organisation. When working remotely, it is essential to:

- Set a time frame for internal meetings
- Meet daily
- Reduce energy-draining meetings
- Redefine the nature of one-to-one meetings
- Give feedback

Set a time frame for internal meetings

Every team needs time for internal communication and for sharing information amongst themselves. When working remotely, especially when teams are spread across different time zones, it can be challenging to find times when all team members are working simultaneously. Team members must know when they are all available and plan internal communication activities around this, rather than around external meetings.

Meet daily

Agile teams get into the habit of daily stand-up meetings (see 'Scrum' tool), during which time they review progress and discuss any barriers to completion. During the meeting each team member is asked three key questions:

1. What did you do yesterday?
2. What will you do today?
3. What obstacles stand in your way?

Remote meetings, just like office meetings, can take place while standing up. Team members can raise the height of their computers or connect from mobile devices. The idea of quick team catch-ups allows you to stay motivated and stick to the remote working

principle that says: 'Different times but the same rhythm'. Short daily remote meetings are also very suitable, for example, for quickly communicating which team members you need to support you today.

Reduce energy-draining meetings

Working in the same time zone and location makes it easy to hold meetings, training events, brainstorming sessions, and status reviews. Naturally, many of your discussions can be conducted remotely using the techniques described in the 'How to conduct online meetings' tool.

It is important to schedule team meetings at times when all team members are available. It is even more important that you only hold meetings when you want people to collectively come up with something of value (e.g., gathering ideas, making decisions, coordinating activities). Working remotely means the end of informational meetings where one person provides information to the rest of the team without any group interaction.

When deciding who should attend a meeting, the following rules will help:

- Only those who bring value to the meeting and take value out of the meeting should attend the meeting.
- If a person is only delivering information but not getting any information from others, then you should ask them to record their message.
- If the person is only receiving information but not delivering any content to the meeting, then you should ask them to watch the recording.

What happens if someone cannot attend?

It may be that not everyone has the opportunity or time to participate in team meetings during the day. What can you do to ensure a good flow of information in this instance?

- Record meetings.
- Make sure that the meetings have follow-ups (conclusions, minutes, and actions).
- Clearly define how the participants will

get acquainted with the materials and what they should do with the knowledge gained.

- Make presentations available.
- Prepare recorded instructions.
- Use Q&As for the asynchronous exchange of information. Questions and answers can be saved to a Slack channel, a MIRO board, or even in a document placed on a shared drive.
- Work on documents in the cloud using the review mode and comments.
- Share progress, even if it's in draft form.
- Brainstorming can also be asynchronous. Use whiteboards and encourage partici-pants to review their colleagues' sugge-stions and overwrite their ideas.
- For larger teams, topic channels work well.
- Gather feedback from team members using survey forms.

How to use technology in remote meetings to make them accessible to people with impairments*

Visual impairments

- Prepare text in .txt, .doc, .docx, .rtf, and .odt formats. Presentations should have the extensions: ppt. or pptx. If using pdf files, you should use them with a digital layer.
- Do not share text scans in jpg or pdf formats without processing them into an editable form.
- Describe image files to indicate the subject and area to which they are assigned.
- Use heading style in documents.
- In text documents, mark the language of the text. This will allow the screen reader program to change the language of the text generator.
- Use sans-serif fonts and align content to the left. Text aligned on both sides is more difficult to read.
- Photos and graphics embedded in text files that convey learning content should be described in alternative descriptions.
- Avoid ‘as seen’ statements - use words instead to describe what is being depicted.
- Use maximum close-ups of interactive whiteboards when they are displaying text.

Hearing impairments

- Avoid a light source (windows, lamps, etc.) at the back of the speaker; sit toward the light source (not against the light) in such a way that the hearing-impaired person can lip-read speech if possible.
- If your video conferencing software does not have a live transcription feature then your colleague can use LiveTranscribe, Google Assistant Speech-To-Text, or SpeechTexter by placing their phone or tablet near the speaker.
- Don't rush the discussion. Live transcription is a bit slower than a regular speech stream. Bear in mind that your co-worker may respond late to your questions.
- Make sure the co-worker understands the meaning of what is being said. Transcriptions can sometimes be misleading.
- Make sure that one person speaks at a time. Ensure adequate sound quality.
- When one person speaks ensure that others are muted. This will reduce background noise to a minimum.
- Use a headset with a microphone for better sound quality.
- Do not cover your mouth. Have your face facing the webcam so that the hearing-impaired person can read your lips.
- Use the comment function or type answers in the chat box.
- Make sure that videos have subtitles enabled.

Cognitive difficulties (e.g., dyslexia)

- Use sans serif fonts (Arial, Calibri, Segoe, etc.).
- Align text to the left, (text aligned on both sides is more difficult to read).
- Introduce increased line spacing in texts and larger spacing so that subsequent paragraphs are recognisable.
- Formulate short sentences and paragraphs.
- Use illustrations and a more graphic format.
- Add alternative descriptions to graphics.

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* Source: see below under Resources: Guidebook on Accessible Classes; Support Office for Persons with Disabilities.

Redefine the nature of one-to-one meetings

Maintain individual, direct contact with team members by scheduling periodic conversations as a routine part of your collaboration. Remember that these meetings are not only for productivity but to support team members in dealing with stress and anxiety related to work, which people relieve through daily contact with the team in a regular job. Individual online meetings are a time for coaching, maintaining motivation, and removing barriers at work. Get into the habit of having your colleagues prepare essential topics they want to bring up when they talk with you. A good practice is to conduct these meetings with the camera on.

Give feedback

When giving feedback on the results of previous work (e.g., providing feedback on a piece of work that was prepared in advance), allow for asynchronous feedback by using written comments. Give feedback on a person's behaviour, however, in a one-on-one meeting (see tool 'giving getting feedback').

If you notice that a team member´s performance is decreasing you should offer them more support and more frequent interpersonal contact (such as virtual one-on-one meetings). You can also introduce more direct methods of accountability and more instruction and coaching for you to determine whether the reason for the lack of efficiency is a lack of competence. When people deliver results, give them maximum autonomy.

3. How to influence the motivation of team members

Remote work can lead to alienation and can adversely affect the mental health of your team members, but this doesn't have to be the case. The effects of remote work will be different for a single person whose work is their only social contact than for someone else who has multiple roles and interpersonal relationships outside of their work. The personality of the employee will also determine the level of influence that remote work has on their motivation. Extroverts are less negatively affected by working from home than introverts. **Never before in the history of leadership has personal knowledge of team members and understanding each individual been as crucial as in the digital world.**

See if you can answer all of the questions below for each member of your team:

- What is my co-worker's situation?
- What stage of life / career is this team member in?
- Was working remotely a choice or a compulsion for them?
- What results have they achieved by working remotely? What has influenced this?
- How does remote work affect this team member?
    - What difficulties and benefits have they experienced?
    - What opportunities and threats have they detected in working remotely?
- What needs are currently vital to them?
- How are you (your team / organisation) responding to these needs? How are you not responding?
- What can you change in the way that you organise and work with this person to create a more pleasant environment for them to work remotely?

Responding to decreased motivation

Is a team member unavailable all day? Are they not answering the phone and their means of communication constantly shows an 'unavailable' status? Do they send tasks late, after the set deadline? Are you noticing a slide in the quality of their work? Don't ignore these symptoms. You must react right away. This is not about being overly controlling but about taking care of your co-workers' mental health. In remote work it can be hard to catch signs of depression caused by isolation.

4. How to resolve conflicts

When working remotely, misunderstandings prompted by misread intentions can create an additional source of conflict. In the real world you can sense the intentions of those around you by paying attention to non-verbal communication, but this is not easy in the digital world.

Digital body language*

People in teams use non-verbal communication to connect and to build trust. Remote communication significantly limits your ability to detect attitudes or motivations from body language. People can still read between the lines to see the intentions of others, however. The only difference is that the signals have changed.

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In the digital world we show:

- **Respect** through response time.
- **Inclusion** through the use of To, CC (carbon copy), BCC (Blind carbon copy) messaging (with added consideration for people with disabilities).
- **Emotion** through emoticons and symbols.
- **Priority** through the choice of communication medium.
- **Identity** through your digital persona, i.e., the image you create in the digital world.

What goes into building trust and fostering connections within a remote team?

- Careful reading of the content that is being communicated. Close reading is the digital equivalent of careful listening in the real world.
- Responding promptly to messages.
- Not adding people into a message chain without warning (never bcc anyone without notice).
- Mirroring the interlocutor in the use of emoticons (mirroring the sender's use of emojis and informal punctuation).
- Showing engagement by adding something of substance (replying to an email with substantive comments).
- Supporting the statements of others through comments in chats (+1, I agree, using thumbs-up emoji in a video meeting).
- Not performing extra tasks during video meetings (multitasking).
- Using the camera during meetings.
- Ensuring the quality of the call and that

there will be no interruptions during meetings.

- Showing commitment by responding to emails comprehensively, including all points raised in previous messages (avoiding a short ‘Ok’).
- When there is ambiguity or misunderstanding in text messages, clarify it over the phone or in a video conference.
- Postponing negative or overly emotional responses. When you detect negativity in a text message, first ask someone else if they read the text’s tone as you did.
- Before sending a message, check if it is clear and if there is a possibility that the recipient may not understand it correctly.
- Responding immediately to messages if it takes less than a minute.
- Let others know when you will reply to their email if their message requires a longer response.
- Keep others informed about the progress of your work while they are waiting for results.
- Show that you are available by marking your status in the communicator you are using.

* Source: see below under Resources: Erica Dhawan (2021): Digital body language.

When conflicts escalate, change the way that you communicate. Switch from written to verbal communication. Move from oral communication to video conferencing. Being able to clarify the situation in a dialogue rather than through a series of messages with an expanding list of people dragged into the correspondence makes it easier to find a way out of the situation.

When resolving team conflict make sure that everyone is present during the meeting. Difficult situations can provoke avoidance reactions. You may be surprised to find that one of your team members has a lousy connection, another is driving, and a third has a meeting in 15 minutes. Pre-empt these situations by clearly stating the expected standard of attendance for the meeting.

During the meeting, make sure that people can see each other. In conflict situations it is a mistake to provide content that dominates the entire screen so that windows with people’s faces become tiny pictures. It is crucial for team members to be able to see each other and their reactions in conflict resolution.

5. How to ensure a sense of belonging in the team

It is easier to build a sense of belonging and team spirit when everyone is working at the same time and in the same location. It is possible, however, to foster a sense of acceptance and appreciation even when a team is working remotely. Some examples of team-building activities are:

- A virtual 'kitchen' where staff can relax and have casual conversations with other team members. They can connect whenever they feel like interacting with others.
- Virtual collaborative activities (e.g., online games, quests) that require cooperation.
- Activities that combine online and offline activities (e.g., shared pizza, where team members physically receive an order from the company simultaneously).
- Participation in workshops, (e.g., chocolate making / natural cosmetics making, etc.) The idea is that participants receive a shipment of ingredients together and are then connected to an online platform.
- You can celebrate birthdays or other important occasions virtually by sending gifts, flowers or singing 'Happy Birthday' together.
- If you meet your team physically (e.g., on a road trip), make sure that the time is spent more on building relationships and on developing contacts than on operational activities. These tasks can be delegated remotely.

Remember that the integration of each team member is not only about celebrating and having fun together. The idea of integration is to build team cohesion and make team members identify with the organisation and its members. The following activities can support this:

- Working through failures together (see 'fuckup nights' tool).
- Supporting each other in problem-solving (see 'peer consultation' tool).
- Joint decision-making (see 'consent decision-making' tool).
- Creating open communication (see 'giving getting feedback' tool).
- Creating an attractive vision for the future (see 'golden circle' tool).
- Capacity building (see 'the leader as a coach' tool).
- Shared team rituals and ceremonies (see 'Scrum' tool).

You can use the activities mentioned in this chapter remotely using the above recommended digital platforms.

Think about:

- What kind of group rituals and ceremonies do you want to have?
- For hybrid teams, (where some work remotely and others work onsite), think about which rituals will allow everyone to participate equally.
- Will the ritual exclude some team members?

When organising your team's work, give some thought to the following areas

Introduce productivity measures for each job

It is still possible to account for the time that people spend on their work and to check whether they are meeting their contractual obligations. Applications such as toggl can be used for this purpose. However, a step further is to hold teams accountable for productivity and performance (see also the 'Scrum', 'Beta Codex', and 'Cell Structure Design' tools). Use the following questions to guide you when assessing the performance of individual team members:

- What is the purpose of this position?
- What is the measure of success for this position?
- How can it be measured?
- How do effective people differ from ineffective people?

Delegating tasks

Establish a work process so that team members know what they need to do without you being present. This requires that you no longer consider work as individual tasks, but instead each task as a project for which one person is responsible. This means that tasks that often involve follow-up activities are tackled and solved in their entirety and do not fall by the wayside half-finished due to unclear regulation of responsibility. Agile methods (read more about this in the 'Scrum' tool) and project work platforms (see instructions section above) can help you with this.

Keeping an integrated calendar

It can be frustrating to try and work out when co-workers are available if they don't keep their calendars up to date. As a rule of thumb, each team member should have a calendar on the same online platform containing their work hours, scheduled meetings, quiet times for conceptual work, and personal commitments (such as a mid-day break to pick up their children from school). This makes it easier to schedule meetings and appointments without having to manually confirm availability

Marking your availability status

Remote working platforms (e.g., Slack, Skype) allow you to mark your availability statuses. As a rule of thumb, team members should have their position set to available as a default during working hours. This is a clear indication to team members that they can get answers in real-time. You should also lay out rules for using the other statuses and what the minimum required availability is.

back

Planning deadlines to take asynchronous working times into account

Working at a standard time and place made it possible to get answers from other team members in real-time. When working remotely, however, team members can become frustrated that they cannot immediately get information from the person they are working with. This impedes the progress of their work. When planning work, team members need to anticipate how much involvement from others is required to complete the task. It is good practice to delegate tasks that require action from others as soon as possible, leaving them a buffer to respond. Agree within the team on what the standard response time should be. When committing to a deadline for completing tasks, be sure to take your own availability into account.

Document flow

It is difficult to work remotely when the company has not undergone a digital transformation and its business processes are still analogue e.g. (documents require a stamp and a manual signature from the decision-maker). Remote working relies on an electronic workflow and the ability to sign contracts electronically.

Ensuring access to work results

It is good practice to share the results of work in the cloud on shared drives. Access to documents allows for asynchronous work, providing feedback in the form of comments and monitoring work progress. A further advantage is that it helps to address perfectionism, where people are reluctant to reveal the results of their work at an early stage before the work is perfect. Access to drafts makes it possible to give feedback at an earlier stage of work. This will speed up the work, improve the quality of the final product (once the feedback received has been taken into account), eliminate individualistic attitudes (defending one's solution because a lot of work has been put into it), and minimise situations where the author ‘sells’ the idea to other team members because more people have contributed to its creation.

Observe the following principles when choosing a system for online work

Functionality

Think about what functionalities you will need. Look for simple solutions that will facilitate your flow of information. There are no one-size-fits-all solutions. There are remote teams who only need cloud-based document sharing software and a virtual chat platform. Some teams may need more complex solutions for project work.

Compatibility

Skype, Google drive, Trello, Outlook: each of these tools is digital but requires switching to different applications to use them. While taking care of your work ergonomics look for integrated solutions. Integrate solutions so that work goes smoothly without you having to switch between too many programs. The software tools listed in the instruction-section above will help you to find a suitable solution.

Limit distractions

Remote interactions are more tiring than live ones. Remember: your body is a tool. You should therefore eliminate distractions when doing deep work that requires focus. Turn off notifications or set the status of your communication tools to ‘unavailable’.

Check how often you switch between tasks and projects and think about how this affects your focus. Change your approach if you notice that frequent changes of activity are affecting your productivity.

Keep moving

People who work remotely move less at work. (For example, they don't go into rooms, go to the kitchen to get coffee, or go down to the secretary's office). Your body is a tool and a lack of movement will affect concentration. Without renewed energy, work will not get done at a good pace or quality. Take offline breaks. Remote work requires more breaks to renew your physical energy levels than stationary work.

RESOURCES

Cappelli, Peter (2021): The Future of the Office: Work from Home, Remote Work, and the Hard Choices We All Face; Warton School Press.

Dhawan, Erica (2021): Digital body language. How to build trust and connection, no matter the distance; St. Martin's Press.

Dyer, Chris; Shepherd, Kim (2021): Remote Work: Redesign processes, practices and strategies to engage a remote workforce; Kogan Page.

Harvard Business Review (2021): HBR Guide to remote work; Harvard Business Review Press.

Neeley, Tsedal (2021): Remote Work Revolution: Succeeding from Anywhere; Harper Business.

Recommended readings in Polish and English:

Poradnik "dostępne zajęcia"; Biuro Wsparcia Osób z Niepełnosprawnościami Uniwersytetu im; Adama Mickiewicza w Poznaniu; Kilka zasad dostępnego e-learningu: https://bit.ly/amu_PL

Guidebook on Accessible Classes; Support Office for Persons with Disabilities; Adam Mickiewicz University in Poznań; Some Principles of Accessible e-Learning: https://bit.ly/amu_EN

#remote work #home office #online meeting

#communcation #teamwork #conflict #motivation

09 Fuckup Nights

‘The only real mistake is the one from
which we learn nothing’
Henry Ford

Benefits

When are 'fuckup nights' especially useful?

- → When you want to increase organisational effectiveness by talking openly about mistakes and your readiness to correct them.
- → When you want to create conditions for innovation by being willing to learn and experiment.
- → When you want to create a workplace where people are authentic, feel safe, and can thrive.
- → When you want to create a resilient team that:
  - → is able to adapt to changing circumstances;
  - → is able to recover and maintain motivation after failure;
  - → is able to cope with adversity;
  - → is able to face challenges;
  - → is able to identify and seize opportunities.
- → When you want to foster a greater level of initiative and courage to take actions that do not follow the usual, conventional paths.

From practice

Maria founded a technology start-up whilst still a student. Full of enthusiasm, she attracted investors and created a small team to develop the service they were designing. After an initial wave of enthusiasm, energy, and some success with the prototype, barriers started to emerge. Maria did not fully understand what was happening. There was growing friction within the team, and the first team resignations started to appear. The investor started to become impatient. Meetings with him became more performance-based than motivating. Conversations with other start-ups at the business incubator where she worked only depressed her. It seemed that everyone was doing well apart from her.

Maria thought that she maybe wasn't cut out to be an entrepreneur after all, and that her parents had been right when they urged her to get a full-time job and experience working for someone before experimenting with her own business. Once, in a newsletter, she stumbled across information about an event called a 'fuckup night'. The name first made her laugh, then she felt that it could finally be something different. She attended the event. Listening to other people's failures made her feel under less pressure herself. It was great to surround herself with people who were willing to admit their mistakes and who had the distance to talk about them. She understood that she was not alone in the difficulties she was experiencing. She enjoyed the meeting and felt a surge of motivation to overcome her difficulties.

Inspired by the event, she decided to consciously introduce a ceremony in her team where they could courageously and humorously tell each other about their failures and the lessons they had learned from them. She realised that they had wanted to put on a professional appearance in front of each other and their investors, which had led them to start feeling ashamed about their failures and to see them as signs of weakness and incompetence. This was blocking their growth and product development. She suggested that the team get together informally on the last Friday afternoon of the month to order food and talk about their failures. These meetings bring catharsis, integrate the group and allow them to feel authentic at work. In the process, they have found that they have improved their public speaking skills and their ability to tell engaging stories.

In a nutshell

Viewing the world through the lens of social media and industry conferences leads to a distorted view of reality. Literally (with photographs) and figuratively, reality is filtered to create the impression of being perfect. As you look at this filtered reality you can experience a gap between your own life and the perfect world around you, in which everyone else appears to be successful. This can make you feel that you are the only one who is not succeeding. Many people feel embarrassed about this perceived lack of success and start to doubt their talents or goals. This in turn prompts feelings of shame which, of all the different emotions, is the one that most often leads to withdrawal from social contact. This downward spiral keeps self-perpetuating. As the creators of 'fuckup nights' say (Brene Brown, Liv Larsson), and as research indicates, the monster of failure feeds on loneliness.

The assumption behind this tool is that people, groups, and organisations can learn from failure and can use it to support their development and further innovation. By properly working through failure, setbacks can become a springboard for future success and for further learning and growth. Openness to failure encourages experimentation, which in turn prompts innovation. The best remedy for the shame of failure is to be open about it and to talk about it in front of others.

A 'fuckup night' is:

- **An event** where people from different industries and backgrounds share their failures in an emotionally safe way that builds bonds and creates a sense of closeness and acceptance of weakness. It represents a break from the culture of success, in which results are emphasised and often exaggerated, whilst failures are ignored or belittled.

- **A method for telling the story of your own failures** that aims to educate and inspire in the form of 'edutainment'. 'Fuckup night' speeches are called business stand-ups.
- **A work and lifestyle manifesto**, the implementation of which increases authenticity, flexibility, creativity and resilience.

The primary goal of the movement's founders is to promote the creation of friendly work environments where people admit their mistakes and learn from them. Places where errors are not punished, and mistakes are not laughed at. Acceptance and the open admission of mistakes make people feel emotionally secure in the workplace and help them to support each other and strengthen their relationships. The result is an empathetic working environment. People can learn from their experiences, experiment more boldly - without fear of criticism or rejection, - and are more willing to try new ways of doing things. All of this increases their ability to innovate. As the founders of the movement often say, penicillin, LSD and Viagra were all discovered by mistake.

Failures are a central part of every human activity, not just the business world. 'Fuckup nights' provide a way to consciously work through setbacks without humiliating those who have experienced them.

Why is this important?
Contrary to the common saying, it is not true that what doesn't kill us makes us stronger. Negative experiences from the past can traumatise us and cause us to withdraw from further experimentation, become paralysed, resort to rigid patterns of behaviour and fail to respond flexibly to future challenges. The way we tell ourselves our own stories and how we end them makes a difference to our future growth, development and success.

INSTRUCTIONS

If you want to develop your ability to learn from failure, it is worth attending a 'fuckup night'. You can be a spectator, drawing on the stories of others, or you can join the titular fuckuppers in giving your own speech. The organisation is present in 90 countries and 300 cities. On the website www.fuckupnights.com you can find the contact details of your local fuckupper. Fuckuppers also run events and workshops within the organisation.

How does a 'fuckup night' work?

It consists in a meeting led by 3 to 4 speakers. Each of them has a maximum of 7 minutes and 10 slides to share their personal story of failure in a light-hearted way, and to say what lessons they have learned from it. After each speech there is a time for a Q&A session. The organisers are also creating a space for networking

How is a ‘fuckup’ speech structured?

The presentation is generally built around a maximum of 7 minutes and 10 slides. It should answer the following questions:

- What was the situation / challenge about?
- What assumptions did you make?
- What happened / what went wrong?
- What lessons did you learn from the experience?

Don't let the short presentation time fool you. The shorter the speech, the more demanding it is, which means it requires preparation.

Principles of a ‘fuckup’ speech

‘Fuckup nights’ should entertain and educate at the same time. For this to be possible, the person telling the story must be distanced from it. As the creators of the method say: Tragedy + Time = Comedy. The speaker must not be looking for emotional support from the group or ideas for solving the problem. Experience shows that if the story makes you angry or you are still disappointed, people will hear it in your tone of voice.

According to the principles of storytelling, in order to be engaging, a story needs to be real and personal, but also universal enough for the listener to relate to it. Ask yourself: What is universal about my story? What is the main message that I want to convey to the audience? What valuable lessons can this experience teach others?

‘Fuckup night’ speeches are light-hearted and should feature anecdotes. These speeches are often called business stand-ups. Remember, however, that you should not force yourself to make jokes or to be funny. If you think about the story carefully, you will almost certainly find moments of humour in the grotesque. The course of events, the intensity of the challenge, your own naïve assumptions and beliefs – all of them can be funny in retrospect. A helpful distance will allow you to see the humorous aspects of the situation.

Fuckup speeches have an anti-TED character. This means that you are not speaking to the audience from the position of an expert, but as an equal. You are more like the kid next door than the wise mentor. Don't create distance. If you want to talk about your expertise, it is only to show how the 'I know better' approach led to your failure.

When preparing your speech, ask yourself

- What is the purpose of your speech?
- What story do you want to share?
- Why are you choosing this story?
- What is your real motivation? Check if your intention is to help others avoid making mistakes, or maybe to gain acceptance and understanding for your choices. Remember that you are there to support the group, and not the other way round.
- What is the main message that you want to convey?

Checklist for selecting your story

Check the following points:

- Is the story universal?
- Are you emotionally distanced from the story?
- Does the story engage and evoke emotion?
- Is the story closed?
- Are you elevating yourself above the audience, e.g. by emphasising your position and expertise, or by inserting industry jargon?
- Can you tell it in a tongue-in-cheek manner?
- Are you telling it in the first person, this means you are the main character of the story?
- Are there surprising moments and plot twists?
- Are you using vivid language, so that it is easy for the participant to imagine the setting, the situation, the people involved, and the course of action?
- Is the message, the 'lesson', of the failure clear and coherent with the story?

Before you give a speech in front of people you should be able to say yes to all of the above. This may require changes to the way you tell the story or even choosing a different story.

How can a ‘fuckup’ approach help shape a culture of learning from failure?

Until a few centuries ago, punishment for business failure was very common. In 17th-century France, for example, bankruptcies were publicly announced. Anyone who was bankrupt was forced to wear a green hat so that the local community could mock and ridicule them with impunity. In Italy, failed entrepreneurs were stripped of their clothes and exposed to public ridicule. By stark contrast the concept of 'fail fast and cheap' emerged a few years ago in Silicon Valley. This approach allows failure to generate continuous and accelerated learning.

‘Fuckup nights’ are not about collecting failures. ‘Fuckup nights’ should build an awareness of failure and encourage responsibility and the ability to learn from failure. The creators of ‘fuckup nights’ have written a manifesto that reflects the ideas behind the movement. Following the directions of the manifesto will allow you to constantly learn and to react flexibly to the challenges of reality in order to move ahead in the desired direction.

According to the authors, the content collated in the manifesto will have a positive effect on our behaviour, in particular on how we share ‘Fuckup’ stories with others, how we present our stories, and how we help companies to create safe spaces where people can swap stories and open up.

‘Fuckup nights’ Manifesto*

01. Get rejected.
02. Have a setback.
03. Get a bad grade.
04. Get fired.
05. Lose a tournament.
06. Fuck (up) the system.
07. Perfection is rhetoric.
08. Focus on the things you value.
09. Keep it simple.
10. You’re probably going to fail.
11. If you’re looking for recognition, stop.
12. If you take yourself too seriously, don’t.
13. Be vulnerable.
14. Laugh at your failures and share them with the world.
15. Embrace your faults and lovingly help others improve.
16. Learn new things.
17. Do one thing a day that scares you.
18. Be the person you want to be.
19. Go out and persist in the face of problems.
20. Rise above conflict.
21. Don’t stop until you get what you love.
22. Your true potential is unknown.
23. Defeat your ego.
24. Be bold and live to the fullest.

* These slogans are catchy and easy to understand. However, if they sound puzzling, read their detailed description at: www.fuckupnights.com/blog/manifesto/.

Things to reflect on the 'fuckup nights' manifesto

Think of the manifesto as suggestions for how to become an organisation that supports learning from failure.

- How do you understand each point?
    - What do they mean literally?
    - What might they be a metaphor for? E.g., ‘To be fired’ could refer to leaving a company, but it could also mean failing as an investor, provider, etc.
- Which manifesto points are already present in your organisation? How and where do you observe them?
- Which of the points would you like to make a principle in your work / your team / your organisation?
- What can you do to make it a reality?

DAY-TO-DAY SUPPORT

Delivering your speech can always be a failure. To avoid this, prepare yourself by analysing all the scenarios that could go wrong.

When choosing a topic, be ready to let it go if it is important to you personally but does not have a great message for others.

'Fuckup night' is a form of catharsis, a way to deal with failure, and a means of building a sense of community through anecdotal recounting of failures. Remember that this is not the only form of working with failure.

You could always create your own ceremony by adapting the idea of 'fuckup nights'. E.g., by talking about failures at informal team meetings or by preparing short speeches about failures. The key is to set the mood. Be careful, however, that uncovering past failures does not turn into blaming others. Look first to see if you are not even unconsciously creating a blame culture in your organisation. The answers to the following questions will help:

- How do we react to failures?
- How do we behave towards people who have failed?
- How does failure affect the careers of people in the organisation?
- How do we apologise?
- How do we take responsibility for failure?

An internal reflection group can be a good way of working through fresh failures or situations that have not been fully closed (see the 'peer consultation' tool).

The key is the goal you want to achieve by talking about failures.

You can discuss the manifesto's suggestions with your team and decide whether to include some of them in your team contract. Together, you can reflect on what actions, ways of working and practices will allow you to learn from failure (for more information look at the 'team contract' tool).

RESOURCES

'Fuckup nights' is the registered name of an organisation. More information about the event and the association can be found on their website: www.fuckupnights.com.

The Fuckup Book is available for free: https://www.fuckupnights.com/fuckup-book/. The Fuckup Book is an initiative of the Failure Institute Founders.

If you want to develop your storytelling skills see: Pixar in a Box. Unit: The art of storytelling: https://www.khanacademy.org/computing/pixar/storytelling.

Useful reading:

Brown, Brene (2010): The gifts of imperfection. Let go of who you think you're supposed to be and embrace who you are; Hazelden Publishing.

Brown, Brene (2015): Daring greatly. How the courage to be vulnerable transforms the way we live, love, parent, and lead; Avery.

Hanson, Rick (2018): Resilient. How to Grow an Unshakable Core of Calm, Strength, and Happiness; Harmony.

Larsson, Liv (2012): Anger, Guilt and Shame. Reclaiming Power and Choice; Friare LIV.

#longlifelearning #failure #fuckupnights #fuckupper

#innovation #vulnerability #resilience #cultureofmistakes

10 How to Conduct Online Meetings

'Nothing good is easy.'
Daniel Craig

Benefits

When is 'how to conduct online meetings' a helpful tool?

- → When you want to conduct online meetings in a result-oriented way and ensure the emotional safety of team members.
- → When you want to manage difficult situations better that are caused by the online format.
- → When you want to help participants to break down personal barriers related to online meetings.
- → When you want to know how to use online tools that allow you to hear all team members and encourage them to participate actively in discussions.

From practice

Jan is the head of a remote team. Until now all team members have met in person once a month to take stock of the goals, discuss the past month's events, and plan the next steps. These meetings lasted 5 hours, a large part of which was a summary provided by Jan. An essential part of the day was eating lunch together. During the lunch the team members had the chance to talk about private things. As a result of these meetings the effectiveness of the team consistently increased. Already in the first weeks, the results improved significantly.

After the lockdown due to the covid 19 pandemic, Jan started to organise these meetings online. The team met at the same time and with the same plan as before, but everybody involved in the meeting saved a lot of time – the team members did not have to commute to work and their employer saved on costs related to the organisation of the meeting. However, the quality of the online sessions was not the same. The employees were not eager to participate in discussions; they were reluctant to turn on the cameras and did not remember their information. Jan was constantly reminding the participants to pay attention. Finally, this development had a negative impact on the business results. Jan is wondering what he can change to achieve better results in online meetings.

In a nutshell

When running an online meeting you need to consider how technology affects the behaviour and attitudes of participants. Although many processes are similar in online events, they have different dynamics than offline ones. For example, people get bored and frustrated faster compared to face-to-face sessions. Technology can lead to unconscious exclusions of parts of the team. On the other hand, this formula can speed up the flow of information and decision-making processes.

INSTRUCTIONS

The following instructions will help you to effectively organise your online meetings in a way that involves all team members. You will learn how to avoid the most common pitfalls of this form of collaboration.

1. Preparation

Answer the following questions when planning an online meeting

- What results are you expecting?
  What should the tangible result of this meeting be? How will you know whether you have achieved your goal or not? Do you need to organise a team meeting or can you achieve this goal another way?
- What is the subject of the meeting?
  The subject of the meeting should be clearly defined. The issue should be self-explanatory and give the team members an idea of what you will be doing during the meeting. A clear, unambiguous agenda that you stick to is even more important in online discussions than in traditional meetings.
- How long should the meeting last?
  Remember that holding too many meetings and too many endless discussions will hinder the organisation from making decisions. Long-lasting computer work drains the energy of those participating. The result is that the efficiency of the meeting will decrease. Your online sessions should be shorter than in-person meetings. An appointment should not be longer than one hour. Each topic you raise should not be discussed for longer than 15-20 minutes.

- Who should participate in the meeting?
  A meeting should be small enough that attendees could be fed with two large pizzas. This rule was introduced by Jeff Bezos, former CEO of Amazon. Only invite people whose presence adds value to the meeting and who will benefit from it. If you have people on your list who only need information about what was agreed in the meeting, then simply send them the minutes of the meeting afterwards.
  If people only need to share something, then only invite them to a short part of the meeting.
  The presence of people who are not interested in the meeting affects the entire group's work – they become less involved and are not adequately focused.

Introduce engaging, variable working methods

An online meeting does not have to be a discussion of 'talking heads'. Involve all participants to express their opinions. Change the working methods. Do not allow one person to speak for long periods. Introduce short physical activities during meetings to stimulate energy and concentration levels. Take into account the needs of all team members by checking whether the methods you have planned will exclude anyone. For example, will introverted people have a chance to mark their presence in a meeting if you schedule it a certain way?

Think about what technology you should use

Many online applications enable virtual teamwork and allow you to share work in real time. Some video conferencing programmes allow you to divide participants into rooms and to work simultaneously in smaller teams. This will enable you to use a variety of different forms of interaction.

Popular video conferencing programmes include:

- Adobe Connect
- Airmeet
- BigBlueButton
- BlueJeans
- Cisco Jabber
- Cisco Webex Meeting
- Google Hangouts Meet
- Google Meets
- GoToMeeting
- Jitsi
- Join.me
- Life-Size
- MS Teams
- MyOwnConference
- Skype
- Uber Conference
- Zoom

Use visual tools during meetings such as presentations, virtual boards or ready-made templates. Popular whiteboards that you can use for remote sessions are Miro, Mural, Jamboard and Padlet.

Suppliers of platforms and whiteboards are constantly developing their functionalities. When choosing software adequate to your own needs it is worth comparing available products online.

The tool that you will ultimately choose for your online work should be easy to use by a person with limited technical skills. The tools are intended to facilitate work, not to intimidate or exclude.

During an online meeting, carefully switch between the applications. The facilitator should consider whether the variety of tools could confuse the participants (Where are we now?; What should I click on?; What should we do here?).

Use the support of your team. You can ask someone from the team to be your technical assistant. Use the knowledge of the group. Courageously ask for solutions they like and would use.

Schedule time for casual conversations

Your aim should be to enable participants in team sessions to share their different opinions in a safe and emotional way. To facilitate this, you can, for example, ask participants to share a story about their culture, their current location, their background or how they like to spend their free time. Be sure to plan time for these activities.

Clearly define the expected standards before the meeting

Many of the difficulties experienced during online team meetings arise because team members are unaware that a particular pattern of behaviour will affect the quality of the meeting and the results achieved. If you want the team members to be present, active, and focused during the meeting, inform them in advance how you expect them to prepare for the meeting.

Participants of the meeting should be informed about:

- Hardware and software requirements:
  Ask participants to have a working camera, headphones with a microphone, and check in advance if they have the latest version of the software.
- The expected level of involvement:
  Tell your participants what level of involvement you expect from them.
- Connection mode:
  Sometimes several people want to meet in one place and connect to the meeting from one device. This may seem logical, but not all the participants will communicate in the same way during the actual meeting. During remote sessions the rule is that everyone should connect from their own device.
- Organisation of the surroundings:
  Ask participants to make sure that the place they are in allows them to participate freely in the discussions and focus on the meeting topics. If you find some of your team members' behaviour disruptive, for example if they are in a noisy restaurant or driving during the meeting, ask them directly to stop.
- Duration of the meeting:
  Set a time when participants should connect and a time when the meeting will actually start. It is worthwhile to set the time of the connection well in advance of the start of the actual discussion. This allows participants to have backstage conversations and time for small talk. Indicate when the meeting will end.
- The meeting topic and the expected results:
  Make sure that the meeting topic is specific and gives participants an idea of what will happen at the meeting. Clearly state the desired result / effect of the meeting.

- Preparation expected from the participants:
  If the meeting requires it, specify how participants should prepare for the meeting. They may need to refresh their knowledge, review reports, prepare proposals etc.
- Need to report barriers in advance:
  Ask participants to inform you in advance about potential obstacles (e.g., a lack of suitable equipment, space to attend, time pressure). This will allow you to take action to limit / prevent these difficulties before you meet.

2. Good practices during the meeting

Agree on a contract with the team

Every team works according to certain rules, whether or not these rules are written down. Employees may find that there is less of a collaborative culture in remote meetings than when meeting face-to-face. To avoid this, enter into a contract with your team members and set out rules of collaboration for remote team meetings.

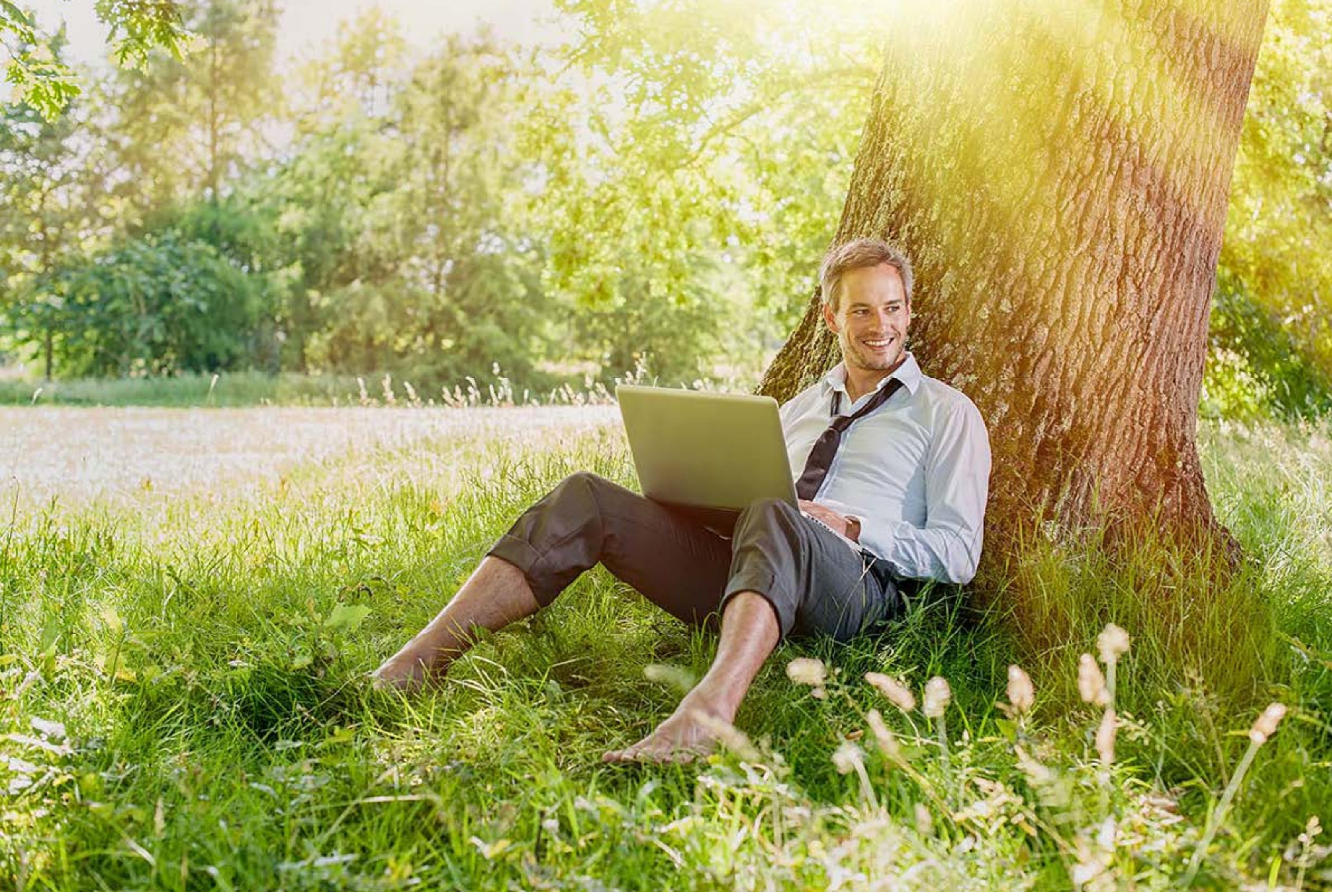
A contract is a set of rules determining how team members should behave and cooperate in a group, the observance of which should have a positive impact on the effectiveness and quality of team cooperation.

When developing a contract, be sure to involve all team members in its creation. If you are doing it for the first time, use the instructions below entitled 'Suggestions for developing a 'contract' with your online team' and the 'team contract' tool in this chapter.

A contract will help you to cope with the most frequent problems present during online meetings.

Suggestions for developing a 'contract' with your online team

Common problems in online meetings	How to anticipate these problems in the contract
Participants do not turn on their cameras. You end up talking to a black screen.	• When is it OK to turn your camera off? • When is it NOT OK to turn your camera off?
Poor connection quality.	• How should you behave when you have technical problems? • How can people get information if a poor connection prevents them from accessing it directly? • Who is responsible for handling this?
2-3 active people. All others remain silent.	• Determine what you mean by the standard of involvement in the meeting. • How should you proceed if you notice a lack of participation? • How can you change moderation to engage more people?
Distractors (e.g., a cat) that are taking the group's attention.	• How will you cope with humorous situations during the meeting? • What will you do to get the attention back so that the meeting can proceed as efficiently as before?
People are tired of sitting in front of the computer.	• How often and how long should we break in order to restart our energy? • What should we do or do not do during breaks? (E.g., it is good practice to not use any electronic devices during breaks).
Disappearance of participants.	• Do we have space for temporary absences? • Which absences are allowed, and which are not allowed? • How will we let others know if we are going to be temporarily absent?
Lack of focus or distractions.	• What does it mean for us to participate fully in the meeting? • Are we tending to multitask during meetings? • How will we react when we notice a distraction?



Remember that you cannot cover all risks and some events will be beyond your control. You should accept that this will sometimes be the case. It is good practice to agree with the group that you will agree on an adequate rule if repeated disruptions occur.

Pay attention to the energy of the group

Participants of remote meetings are less forgiving than in traditional meetings. A boring remote meeting will bore you more quickly than if it were held traditionally. Participants also have more distractions in remote meetings e.g., wanting to check their emails or read posts on social networking sites. Even if you have planned forms of work that keep participants active, check the level of involvement and change working methods flexibly to avoid draining the energy of the group.

Ask the group for regular feedback

When you notice disturbances during online teamwork, you can ask participants for on-the-spot feedback to hear the perspective of team members and take appropriate action. For example, if you notice that concentration is dropping, you can share this perception with the team and ask them how they view the situation. If concentration levels are low, ask the group what should be done to help them to improve them.

Regularly ask the team for feedback on the working methods. Which methods would the team like to work with? What causes an increase or decrease in commitment? What are the barriers that the group perceives in remote meetings? What new rules would help them to deal with these barriers better?

Summarise the meetings

A well planned and well conducted remote meeting will allow a team to achieve tangible results in a shorter time. Take the time at the end of the session to review the expected effects. Mention not only the tangible results but also the team's style of work. In this way you will encourage positive behaviour in the future.

Ensure communication between meetings

Create a virtual space on a shared drive where you can place materials from the meeting (e.g., minutes, presentations, content developed during the meeting, etc.) so that people who were absent have easy access to information. Transparency, openness and good documentation are a must.

DAY-TO-DAY SUPPORT

When you plan an online meeting:

- Look at the current ways that team members cooperate:
    - Which methods could lead to exclusion?
    - Which methods could block the involvement of team members?
    - Expand your perspective by asking for the opinion of other team members.
- How can you change the way you work to involve all team members equally?
- Take extra time to establish rules for practical cooperation in remote meetings by setting up a contract with the team (see tool 'team contract').
- Talk regularly with team members about what works for you and what does not work in cooperation.

Use the checklist below to see how well prepared you are.

Checklist

→ Have you chosen an online platform that helps you achieve your goals and that ensures equal participation of team members?

→ Do the tools you have chosen provide IT security for your organisation?

→ Have you planned variable working methods that take into account the different ways your participants think?

→ Have you made sure you have access to a shared drive where you can share relevant content?

→ Have you planned time to enter into a contract with the group that ensures the effectiveness and emotional safety of the participants?

→ Have you planned methods for collecting feedback on the quality of meetings so that you know how to improve them in the future?

→ Have you informed participants of the expected level of engagement during the session?

→ Do participants know what technical requirements they have to meet to get the most out of the meeting?

RESOURCES

Tippin, Mark; Kalbach, Jim; Chin, David (2018): The Definitive Guide To Facilitating Remote Workshops: https://bit.ly/Remote-Workshops

Interesting insights on the topic of 'Zoom-fatigue': Lee, Jena (2020): A Neuropsychological Exploration of Zoom Fatigue: https://www.psychiatrictimes.com/view/psychological-exploration-zoom-fatigue.

Looking for more remote meeting tips and resources? You can also use the 'remote work' tool in this handbook.

#onlinemeeting #remotework #homeoffice #feedback

11 NAIKAN Method

'The inner view determines and shapes
the view to the outside!'
Ruedi Beiner

Benefits

When is the 'NAIKAN method' useful?

→ When you want to create healthier, tension-free relationships.
→ When you sometimes don't know how to react adequately to challenging situations caused by other people.
→ When you want to identify and unders-tand your patterns of behaviour.
→ When you want to have greater control over your automatic reactions by increasing your self-awareness.
→ When you want to resolve conflicts around you more effectively.

From practice

Dominik has just finished another project meeting with his team. Once again, when he asked his team detailed questions about the project, it turned out that they did not know the answers. In his opinion, they are incompetent and not engaged. Their response threw him off balance, leading to him reacting emotionally. He quickly made a few new decisions and changed the approach within the project to speed things up. The lack of professionalism among his colleagues gets him down.

His team, on the other hand, perceives Dominik as impulsive and emotionally unstable. They complain about the way he suddenly changes his mind on decisions. This makes their work challenging and leads to frustration. They want him to work on his behaviour because they find working with him unbearable. He doesn't seem to realise that there is a problem, however.

In a nutshell

The NAIKAN method enables in-depth self-reflection about one's behaviour towards other people. It comes from a Japanese tradition. In Japanese, the word 'NAI' means 'inside', and 'kan' means 'insight'. NAIKAN therefore means to look inside.

Focusing on three simple questions allows you to develop your leadership skills as you look at yourself, your reactions, emotions, and behaviour towards other people.

With the NAIKAN method we can look at our past actions not from our own perspective but through the eyes of others. This method consciously abandons the habitual assumption that others are the cause of our problems, thereby helping us to avoid automatically blaming others for our actions.

In difficult situations, we usually look for the reasons for our behaviour in external circumstances. We justify our behaviour by the situation in which we find ourselves or based on how others have acted in the past. Meanwhile, people who observe the problem from the outside are more likely to see reasons for that behaviour in our character traits.

The habit of blaming others for their reactions brings temporary relief. In the long run, however, it makes us stop managing ourselves and we lose the ability to respond adequately to new situations.

The tool is intentionally constructed asymmetrically. NAIKAN does not allow for conventional thinking about the difficulties that others have caused us. If you get caught up in this thought, don't develop it; switch back to one of the three following questions.

Three questions for self-reflection

What has this person done for me?

What have I done for this person?

~~What difficulties has this person caused for me?~~

What difficulties have I caused this person?

INSTRUCTIONS

To develop your leadership skills, consider a problematic situation in the past where an important person was involved.

Think about this event by answering the following three questions:

- What has this person done for me?
- What have I done for this person?
- What difficulties have I caused this person?

When analysing the situation, take the perspective of the other person. Look at the situation through this person's eyes. Be careful not to examine it from the perspective of your feelings.

Think about it:

What have you learned about yourself? What behavioural patterns have you discovered? How do you want to act in the future – with regards to this person / in similar situations?

DAY-TO-DAY SUPPORT

People who work with the NAIKAN method notice that problems are often not objective but result from their perception. This has a significant impact on reducing tensions and improving their relationships with those around them.

Some leaders are in the habit not of blaming others but of blaming themselves. They hope that others around them will not be so harsh on them if they criticise themselves. Like blaming others, blaming yourself is also an unhealthy strategy for dealing with the internal tension of a difficult situation. The aim of the NAIKAN method is not to devalue yourself. It is a method that focuses on taking responsibility for your own reactions and your way of functioning in difficult situations by observing your behaviour from the perspective of others.

Beware of a superficial analysis and of hasty conclusions. NAIKAN was initially a meditation method which required a long time focussing on just one relationship with a significant person. Focus on silence, calmness, and concentration. Do not let your thoughts drift away. Set aside a specific amount of time (e.g., 20 minutes), set a timer, and keep thinking about these three questions, even if you feel that the situation can be solved solved in less than the specific time. Until the timer rings, deepen the answers by asking: 'What else?'

If you notice a tendency to run away from conclusions, check whether the reason is blaming others for past events. If this is the case, switch your attention to the objective language of facts. Consider more what happened than what it means to you. In practice, this means using more nouns and verbs than adjectives.

Example: In the above story, Dominik concludes that his colleagues are incompetent and not engaged. The adjectives 'incompetent' and 'not engaged' imply a judgement. If Dominik had thought about which behaviours he interpreted as lack of engagement and incompetence, it would have turned out that he did not receive answers to his questions. The lack of response made him feel insecure and led him to act unprofessionally. Focusing on the facts would have allowed for a broader view on the situation and different perspectives.

RESOURCES

The author of the NAIKAN method is Yoshimoto Ishin.

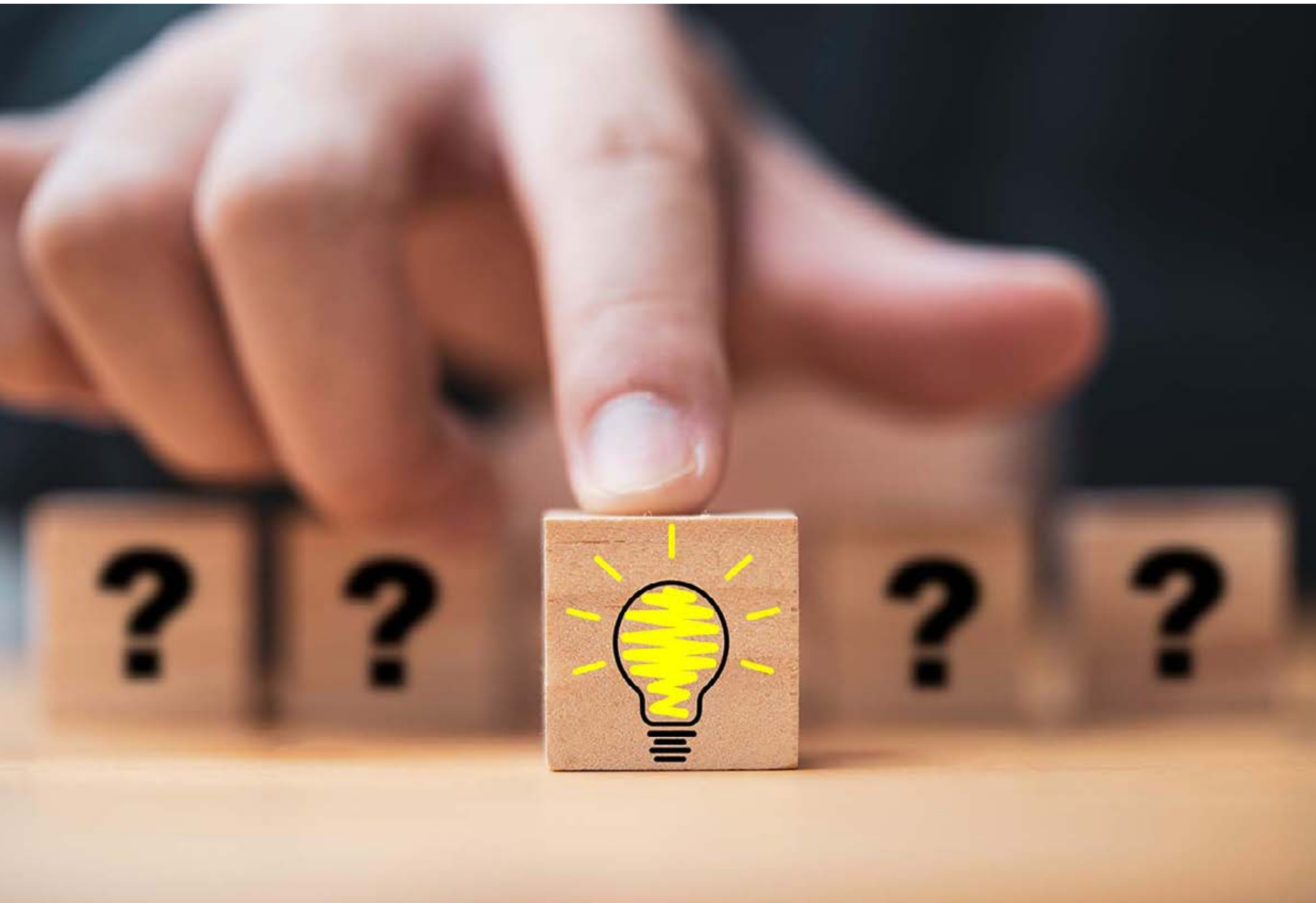
More about this technique can be found here: https://www.naikan.eu/english/index.html and http://www.e-naikan.com/engl_index.html

Worth reading: https://insightvoice-naikan.at/download/ebook-naikan-ishii.pdf

#naikan #self-reflection #self-awareness #conflict

12 Inner Drivers

‘I can only change what I accept.’
Carl Gustav Jung



Benefits

When is the 'inner drivers' tool useful?

- → When you want to be able to manage tension and stress in a better way.
- → When you want to have greater access to your resources (skills, abilities, action strategies).
- → When you want to have a more suitable choice of solutions to the situation you are in.
- → When you want to improve your flexibility in dealing with other people.
- → When you want to be more likely to get along with others.
- → When you want to reduce the amount of tension you experience and that you cause yourself.

From practice

Robert leads a five-person R&D team. The team has been working on a new application for six months and has just hit a crisis. The tests of the prototype turned out terribly. The meeting at which the leader presented the results took place under great tension and stress.

Karolina started to get impatient, clearly tapping her phone on the tabletop and hurrying Robert along, telling him to 'get to the point'. Gregory began firing off a series of detailed questions about the data collection methodology. Julia suggested sending her the results for her to analyse herself and make a recommendation for further action. Matthew mentioned that it was worth considering abandoning this project. He quickly outlined three more interesting options that could be addressed. Anna eased the tension by saying that Matthew definitely didn't mean what he said, and then asked the participants what they would like to have for lunch.

Each team member reached for an old and familiar strategy for dealing with stress. None of them were effective and none of them led to a way out of the situation. Robert wonders how he can encourage the team not to fall into old patterns of reacting to difficult situations, but instead to engage in the situation with effective solutions in a focused way.

In a nutshell

In stressful situations, everyone has their habitual behaviours with which they want to regain control in this situation and return to balance. In such moments, automatic, often unconscious reactions occur, which are not the best strategies for meeting a challenge in a solution-oriented way. These ways of behaving are triggered by compulsive rules such as 'You should…', 'You must…', 'Be…' and are called inner drivers.

Drivers help to understand why people behave illogically and unfavourably in certain work situations and why they maintain these behaviour patterns despite negative experiences.

Here are some examples:

- People hurry to complete a task quickly, even though it requires a certain level of accuracy.
- They delve into a subject and describe every detail to perfection, even when only a generic overview is required.
- They look for comfort when a situation calls for confrontation.
- They take sole responsibility, even when they have the support and wisdom of a team to fall back on.
- They do their best but soon lose interest in completing the task.

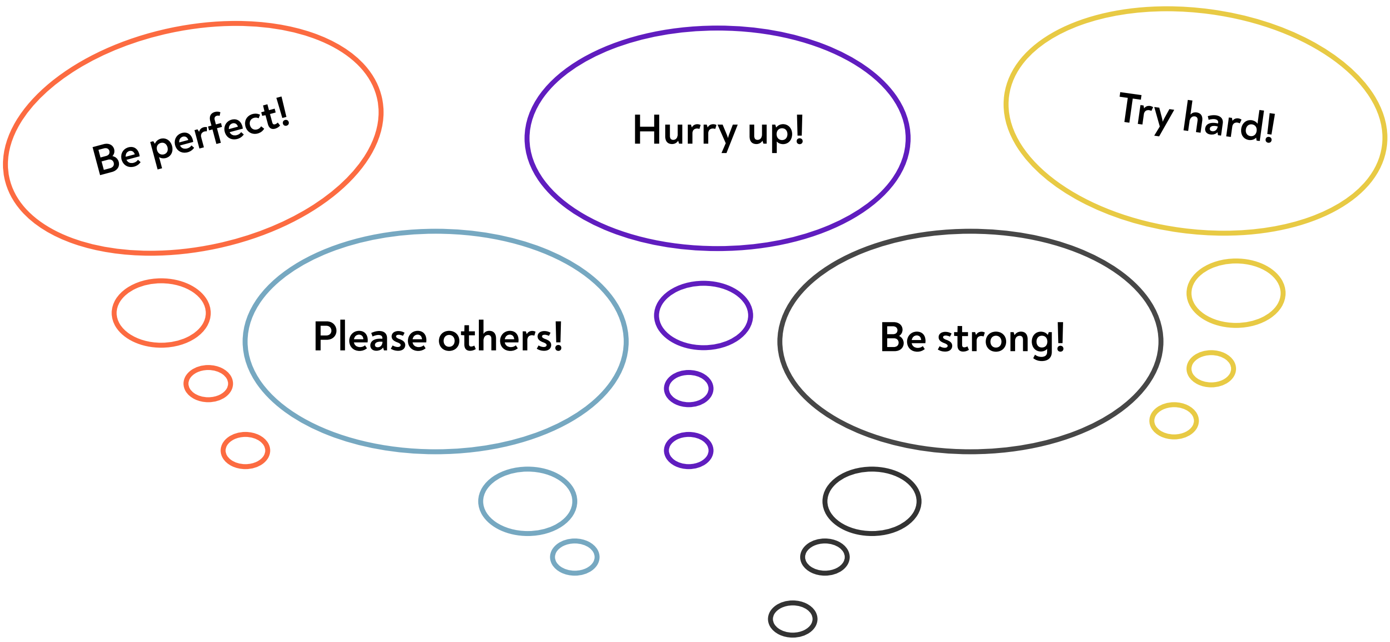
From your perspective as a leader, being aware of what drives people's stress will allow you to lower the tension and take back control of their inner driver so you can respond more effectively to stressful situations. Becoming aware of your own drivers helps you better understand what impacts the way you manage your time, collaborate, and connect with others, for example.

Taibi Kahler has identified 5 main drivers that prompt people to act and that lead to dysfunctional behaviour. These are the following imperatives:

- Be perfect!
- Hurry up!
- Try hard!
- Please others!
- Be strong!

According to Taibi Kahler, we can find these five drivers to a greater or lesser extent in the behaviour of every human being. Each individual will have a combination of dominant and subordinate drivers. We do not constantly react under the influence of our drivers. They become particularly powerful when things do not go according to our expectations, thereby causing stress or tension.

The 5 inner drivers



INSTRUCTIONS

Keep in mind that many of the behaviours triggered by inner drivers are perceived positively by you and those around you. They can sometimes also have a positive effect, since strengths or talents can result from them, for example. At this point it is important to ascertain whether your behaviour is the result of a free, conscious decision or whether it is dictated by an inner compulsion. Do you have to complete a task as perfectly as possible or could you cope well with sometimes only performing 80%. Do you feel responsible for a good atmosphere or are you able to cope well with tension? Do you doubt yourself or question your self-worth if you do not react according to the driver?

People who act under a strong influence of their inner driver fall out of the 'I am OK' life position (see tool 'life positions'). In their own self-perception, the following rule applies: 'I am OK if ... I am perfect / I hurry up / I try hard / I please others / I am strong.'

These requirements can never be met. Whatever a person does, it will never be enough: not fast enough, not perfect enough, not sufficiently lovable, not strong enough, not enough effort. Inner drivers are a burden on any individual, and there is no positive flipside to this coin.

The most important point is that you can liberate yourself from your inner drivers by growing in self-awareness and by learning new ways of behaving.

If you want to work on your inner drivers, the first step is to identify them. The following text shows how you can develop new permissions that will invalidate your old imperatives.

Below you will find instructions on how to identify your inner drivers. Before you start, read the following examples of the effects that inner drivers can have.

Example of how inner drivers have an impact at work

Be perfect!	• You spend so long improving the spelling and grammar in a bid that you miss the submission deadline. You send the bid off anyway, but it is not processed. • When giving feedback to colleagues, you never express your satisfaction because the task could always have been done better. • You have a bad time at a team-building event you organised because one of the tables has a wobbly leg.

Hurry up!	• You prepare a last-minute bid. You quickly send it and close your computer immediately afterwards. You don't notice that the bid remains stuck in your outbox. It is not considered in the tender. • You give general feedback because you have only cursorily read a colleague's work. The meeting has no added value. • You organise a team-building event where you only drop in briefly because you have three other appointments that day. You are slightly absent-minded. As a result, you don't get to know anyone better and you don't integrate further into the group.
Try hard!	• You enthusiastically promise a client that you will write the offer faster than expected. You write it at night at the expense of time with your family. You are annoyed because you do not get the assignment despite extraordinary effort. • Although a colleague has performed very well, you are annoyed at the feedback meeting because she did not give her best. • You don't know how to relax at a team-building event. You behave like a restaurant manager.
Please others!	• You propose solutions that benefit the customer but are against the interests of your company. • You have concerns about a colleague's performance. Nevertheless, you only give positive feedback and keep your dissatisfaction to yourself. • At a team-building event, you ask everyone to have fun, you keep them entertained, and you offer drinks to keep them happy. You don't take care of yourself and don't allow others to take care of you.
Be strong!	• Although you are overburdened, you do not delegate the preparation of the bid to a colleague. • You avoid giving encouraging feedback to your colleagues. You believe that people should motivate themselves. • You have a stomach-ache and feel uncomfortable at a team-building event. You don't let it bother you, however. You simply grit your teeth and stay until the end.

Find out which inner drivers influence your behaviour

The next step is about your inner drivers. Read the description of the five drivers and tick the actions that describe how you behave in stressful situations.
Be honest with yourself.

Be perfect!

Behaviours	• I am quality oriented. • I have high standards for my work and personal life that I strive to live up to. • If I do something, I do it perfectly, striving for perfection. • I like to make sure that everything is flawless, even if it requires checking the task several times. • I value reliability, attention to detail and accuracy. • I am well organised. • I find it difficult to work with people who are not precise in what they do. • I try to exceed the expected standards. • I like to get the highest marks.

Behaviours	• I find it difficult to achieve satisfaction in what I do because I have a constant feeling that it could be done even better. • I pay a lot of attention to detail. • I tend to micromanage when delegating tasks. • My insights mean that I am perceived as a person who is critical and picks up on details. • I notice what doesn't work ('holes in the whole') and take remedial action. • I like to follow routines, procedures, and structures. • I hear that I am 'too serious' in some situations. • I like to have everything under control. • I'm not easy to please.
Personal cost	• Tendency to miss deadlines due to an obsession with quality. • Rigid clinging to beliefs and values in situations that require more openness and flexibility. • Difficulty in achieving satisfaction - a constant feeling of inadequacy. • Problems with prioritising. • Loss of enjoyment in work. • Criticism of others, expecting them to be similarly perfect. • Not completing tasks due to a fear of criticism. • Excessive control of self and others.

Hurry up!

Behaviours	• I am performance oriented. • I complete tasks quickly. • I do not pay attention to details. • I can improvise and take risks. • I can maintain high efficiency under time pressure. • I put tasks off until they become urgent. • I do extra activities during a call or meeting. • I like to be on the move. • I do a lot of things at once. • I speak faster than others. I tend to interrupt others or finish their sentences. • I run from meeting to meeting, often without planning breaks in-between.

Behaviours	• I move conversations and meetings forward. This is often challenging for others. • I am irritated by people who procrastinate. • I like to move quickly from idea to implementation. • I can be overtly impatient. • I rush others. • Delays and a slow pace get me off balance. • I expect quick and practical answers.
Personal cost	• Anxiety and tension. • Taking action even when it would be better to wait patiently. As the maxim states: 'quickly, quickly before you realise it's pointless'. • Tendency to risky and even dangerous behaviour. • Emotional outbursts. • Being an outsider who is always 3 steps ahead of others. • Lack of space in the calendar to think calmly, to plan, to maintain perspective.

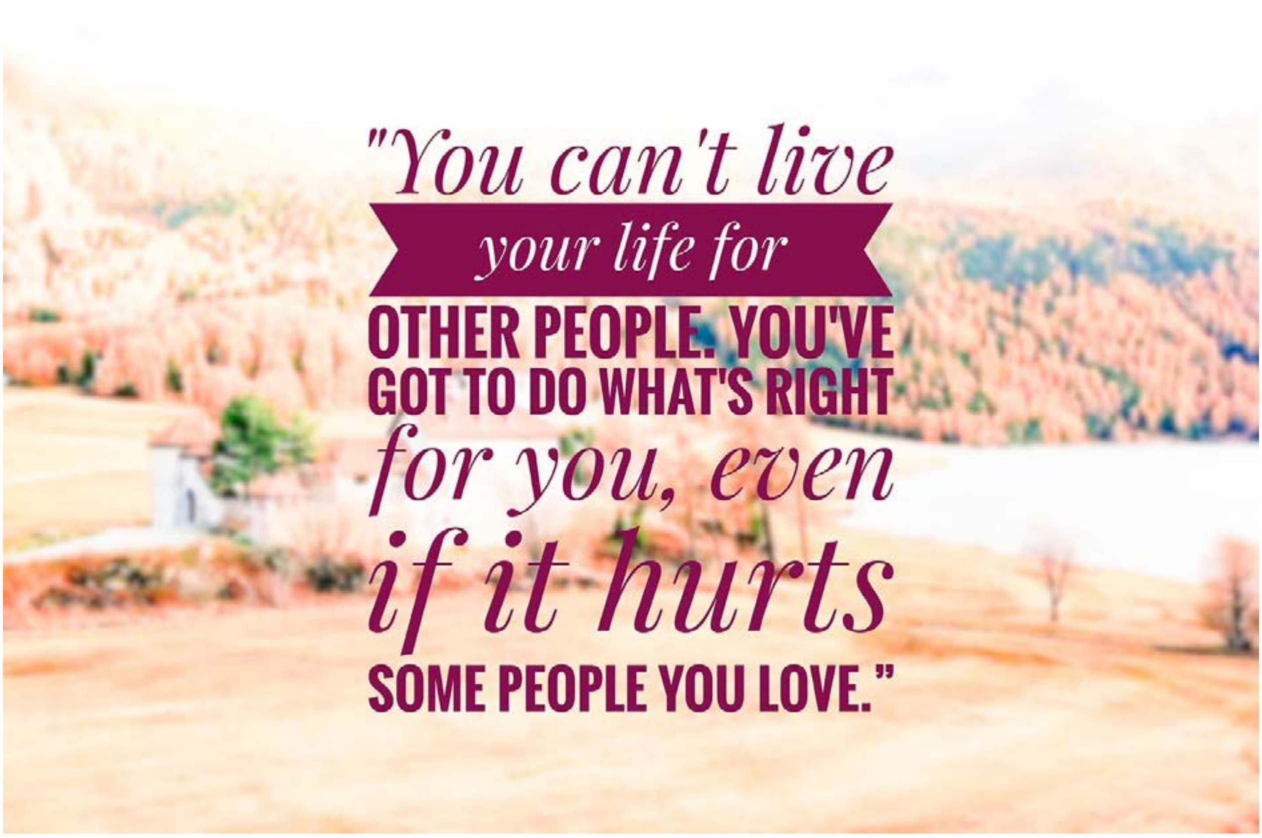
Try hard!

Behaviours	• I approach new tasks with enthusiasm and energy. • Even when I have a lot to do, I find it hard not to take on new projects. I at least try to work on them. • I am convinced that I have to constantly improve and to be doing more and more. • No matter where I am, it's not good enough. • I lose motivation when I am close to completing a project. • New ideas and food for thought distract me from the main task, which bores me very quickly. • Although I follow the motto of not procrastinating on tasks, in practice I often put them off. • Things are not as easy and simple for me as many people think. • According to others, I tend to complicate tasks. • When I tackle a task, it turns out to be more complicated than it first seemed. • Once I've worked out all the details, I tend to abandon a project because I find I don't have the resources to cope.

Behaviours	• I find it difficult to relax. • Although I try hard, I rarely have the success I deserve. • I don't finish things. I have to really pull myself together to get tasks done. • I am more interested in trial and error and experimentation than in completion. • Each day I start a new task. • Nothing comes easy to me in life. I have to work hard for everything. • I feel that I am not living up to my potential.
Personal cost	• Many unresolved issues - fear of failure paralyses successful completion of projects. • No real successes despite the enormous effort invested. • Getting lost in details. The effort is not proportionate to the results achieved. • Weakening oneself by looking for the reasons for failure in external circumstances. • Living a dream. • Hostility and aggression towards successful people.

Please others!

Behaviours	• I bring harmony to teamwork. • I feel responsible for making those around me feel good. • I always give people my undivided attention. • I find silence in a conversation uncomfortable, so I try to fill it to make it more pleasant. • I care about people liking me and accepting me. • I feel bad when I have to criticize someone. • I avoid conflict. • I'd rather keep my thoughts to myself than have a confrontation. • I take criticism less well than others. • I adapt easily to new places and rules. • Other people's happiness is more important to me than my own. • I care about other people's opinion and how they evaluate my work. • I am compliant, I like to say YES, I don't like to say NO. • I am more willing than others to make sacrifices for the team.



Behaviours	• I want people around me to be happy. • I handle things diplomatically so as not to offend anyone. • I am happy when the people around me are happy. • I put others' well-being before my own.
Personal cost	• Satisfying others is often superficial – done without thought for the real needs and feelings of co-workers - and can therefore be met with rejection. • Not expressing one's dissatisfaction directly turns into passive-aggressive behaviour (backbiting, gossiping, lateness). • Procrastinating and building up problems by not having the courage to confront them. • Agreeing to unfavourable solutions, being stuck in unhealthy relationships and arrangements. • Blaming others for a lack of team spirit. • Lack of respect and being taken seriously.

Be strong!

Behaviours	• I don't like to feel self-pity or show weakness. • I am eager to help others and reluctant to take advantage of help. • I have a strong sense of duty. • I am known for my reliability and perseverance, even when the task is overwhelming or unpleasant. • When others panic, I still keep my head down. • Asking for help embarrasses me. • I keep my problems to myself and solve them myself. • When the going gets tough, I grit my teeth and stick at it. • I like to be self-sufficient. I don't like to be dependent on others. • I prefer to be at a distance from other people. • I tend to shoulder a lot more than the average person. • I like to keep my problems to myself. • I am irritated by people who are weak and who 'fall apart' when faced with problems. • When people are in crisis, they often come to me for support.

Behaviours	• When a problem arises, I know I can handle it. • I prefer to control the situation rather than give away my influence to others. • I can be seen as bossy in difficult situations. • People admire my toughness and resilience, but some-times treat me like a heartless machine.
Personal cost	• Difficulty communicating and building close relation-ships. • Not benefiting from social support within the team • Lack of a sense of belonging - walling oneself off from others. • Low empathy for others - expecting them to be equally strong. • Distancing from co-workers leads over time to co-workers starting to avoid contact. • Lack of cooperation and exchange of positive emotions leads over time to cynicism and bitterness.

After reading the descriptions, work out which driver you made the most selections for. Remember that more than one driver can influence your behaviour. First deal with the driver that you think manifests most strongly in your behaviour.

If you have difficulty identifying your inner drivers, consciously observe your reactions in difficult situations over the next week. You can also ask people you trust for help in identifying your drivers.

Develop new permissions that invalidate your old imperatives

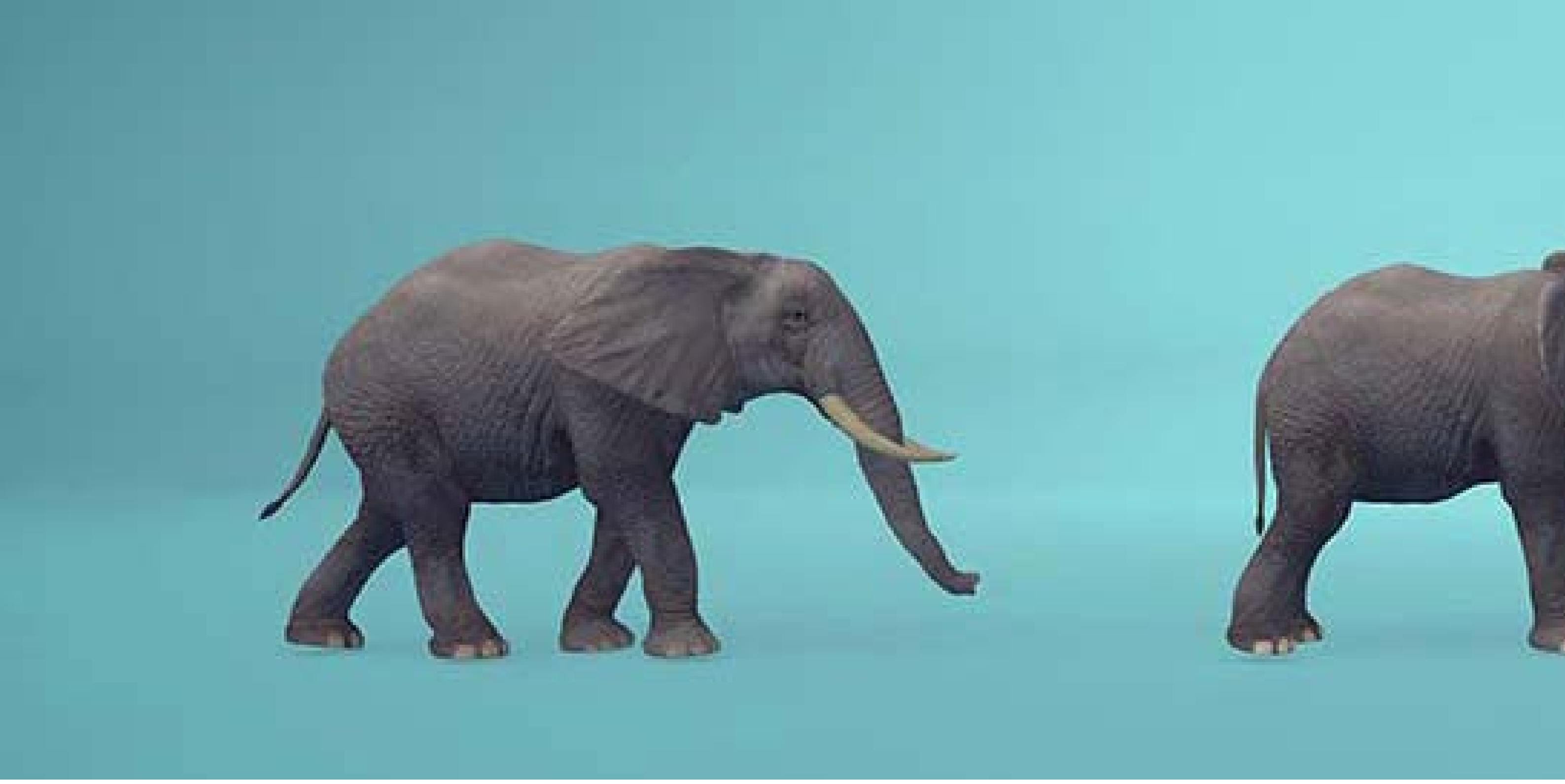
According to Taibi Kahler, we can detach ourselves from our inner drivers step by step. It is a process that leads us to a better quality of life and greater resilience in our personal decision-making, patience, and benevolent understanding of ourselves. Once we have identified our inner driver, we replace the imperative ('I am OK if …') with the corresponding permission.

Read the permissions that go with each driver.

Main imperative: I am OK if…	Permission
I'm perfect.	It's OK to be the way I am. I am good enough.
I hurry up.	It's OK to take time for myself. I am in no hurry.
I try hard.	It's OK to do things with ease and to be successful when doing it.
I please others.	It's OK to respect and take care of myself. I am allowed to say no.
I'm strong.	It's OK to open up and express my own needs. I am allowed to ask for help.

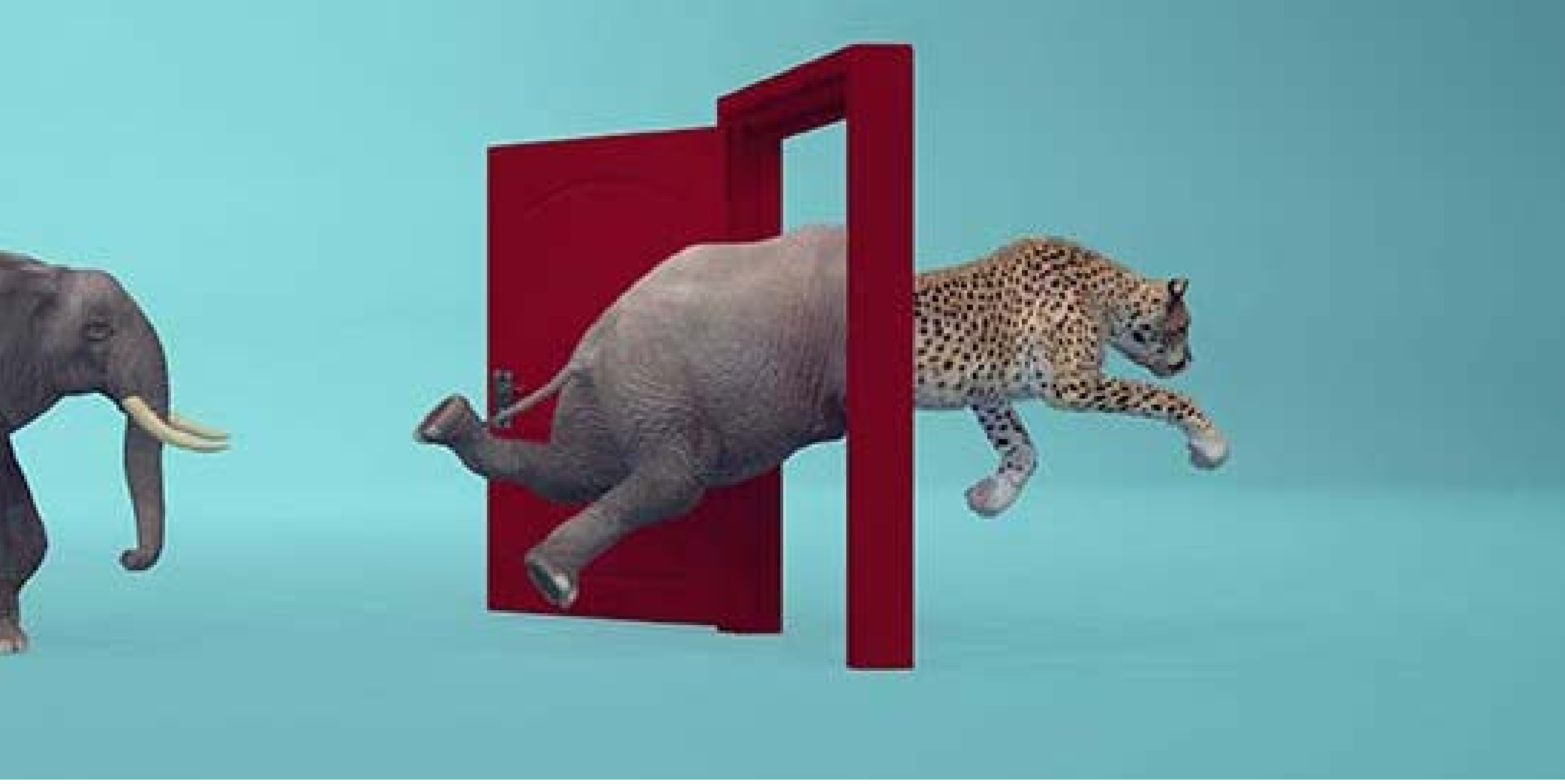
Think about these 'enablers' and make notes on the following questions:

- What does this permission mean to you?
- What would it mean in practice to implement this permission in your life and work?
- What concrete actions can you take to replace your usual reactions prompted by your driver?



You can use the tips below to define new ways of working

If your driver is ...	... you can support change through the following behaviours:
Be perfect!	• Keep tasks on schedule. • Prioritise. • Make contracts with yourself - what criteria does a task need to meet to be done well? Focus on replacing 'excel-lent' with 'good enough'. When a task meets the criteria, stop working on it. • Give thoughtful feedback - beware of criticism. Show appreciation instead. • Encourage more humour and a better atmosphere.
Hurry up!	• Pride yourself on the accuracy of your work, not the speed or volume of tasks completed. • Work at the rhythm of the team, don’t rush. • Deliberately take time to reflect and plan before making decisions. • Ask others questions and show an interest in their perspective. • Plan moments during your day where you will be ‘present’ and not do anything. • Give people your full attention. Focus on the conversation or meeting without doing anything else.



Try hard!	• Pride yourself on finishing tasks, not simply generating ideas. • Pride yourself on finding simple paths to your goal. • Focus on achieving results, not simply putting in the effort. • Don't start another project until the current one is completed. • Check that the commitments you make to yourself and others are realistic.
Please others!	• Notice when you conform to make things easy for others. Express your needs in those circumstances. • Pride yourself on your assertiveness. Set boundaries. Learn to say no. • Instead of getting involved and making things easy for others, take an observer's position. Observe what happens. • Check your boundaries against your value system. What is okay for you and what is not? • Learn cooperative, non-violent conflict resolution (cf. methods 'inclusive dialogue' and 'giving getting feed-back').
Be strong!	• Seek contact with other people, get in touch with them more often. • Talk more often about your feelings and needs. • Accept help. • Ask for help. • You can start with mutual support. Ask people who you have done favours for if they will help you.

DAY-TO-DAY SUPPORT

Remember that working on your inner drivers is a process that takes time. It certainly won't work 100% the first time and it will still feel strange the fifth time. At the end of the day, we have been living with our drivers since the early years of our lives. It is therefore important that you make a personal decision to go this way, have patience with yourself and be a friend to yourself throughout this process by kindly accompanying yourself.

If you work consciously with the inner drivers, their influence will reduce over time. Consciously noticing and naming your drivers is the moment when you regain control over your behaviour by deciding to behave differently than you have in the past.

If your inner driver is pushing you to behave in a certain habitual way, give yourself permission to change your behaviour accordingly (see above).

If this approach creates a lot of tension and you find it difficult to change your behaviour, have an inner dialogue about your driver:

- What does [insert name of driver] really mean to me?
- Who says I have to be [insert driver]?
- What is the worst thing that can happen if I don't behave the way my driver tells me to?
- What is the best thing that can happen if I don't behave the way my driver tells me to?

As a leader, you can suggest to individuals in the team or to your whole team to work with the tool 'inner drivers'. Offer your co-workers bilateral conversations for support (cf. tool 'leader as a coach').

RESOURCES

The concept of inner drivers was originally developed by Taibi Kahler in the 1970s. It is part of transactional analysis.

Stewart, Ian; Joines, Vann (2012): TA Today. A New Introduction to Transactional Analysis; Lifespace Publishing.

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Bhonsle, Aman (2018): Essential TA: A Common-Sense Psychology. A Handbook of Applied Transactional Analysis; Notion Press.

Kahler, Taibi (1978): Transactional analysis revisited. Human Development Publications.

Hay, Julie (2013): Drivers – and Working Styles – an Essay:
https://juliehay.org/wp-content/uploads/2020/01/drivers__working_stlyes_-_an_essay.pdf

#inner drivers #stress #enabler #life positions

13 Discounting

'There isn't a person anywhere who isn't capable of
doing more than he thinks he can.'
Henry Ford

Benefits

When is this method useful?

- → When you want to find out why team members are stuck fast in their old ways of working and are not aware of why they must change these.
- → When you want to understand the opposition that team members may have to changes.
- → When you want to be able to help team members to develop further and to identify effective strategies when they are clinging on to old and obsolete ways of working.
- → When you want to use appropriate interventions to help team members adapt to change and move ahead.
- → When you want to understand why individuals in your team avoid making firm commitments or taking on obligations.
- → When you want to understand why team members have a different perspective on reality than you.

From practice

Marta is working on a project with Daniel. They are working at a distance, not in the same location. They have determined a shared timetable that they want to keep for their work to proceed. Daniel misses the deadline every single time. This means that Marta has to save the situation as project manager by putting in extra hours.

This situation bothers Marta so much that she organises a meeting to ask Daniel how he can restructure his work so that he can meet his own commitments. Daniel is visibly surprised. He makes clear that he is a well-organised colleague and that they are both equally skilled at project work. Marta loses confidence in the work with Daniel getting any better.

Where is the mistake in this approach?

Marta is not regularly responding to Daniel's failures to make the deadlines. She saves the situation by working extra hours and making up for Daniel's failure. She has a feedback scenario in her head, but she has not given Daniel any feedback yet.

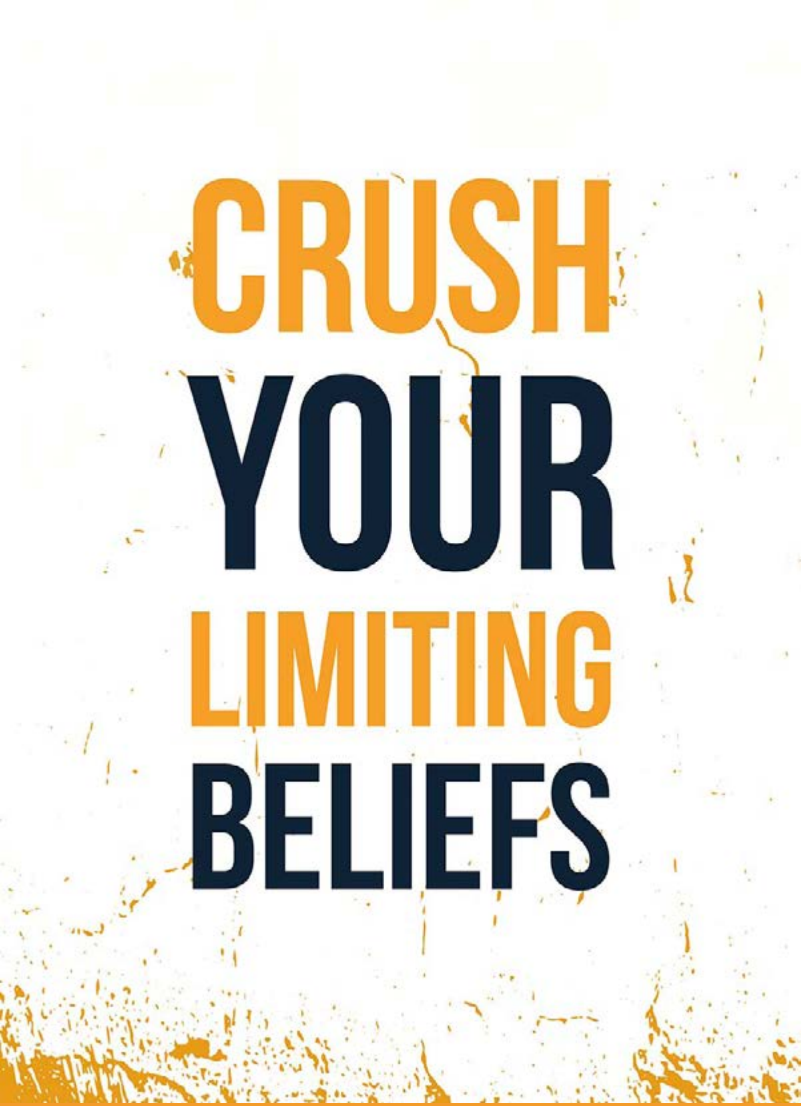
Daniel discounts the significance of the problem. Although he knows that they have agreed on deadlines, he does not view these agreements as important. He is convinced that missed deadlines are part and parcel of project work. From his perspective on their collaborative work, nothing troubling is happening in the project and things are coming along well.

Marta wrongly assumed with her intervention that Daniel was not keeping an eye on his resources. She decided that Daniel needed help to work more effectively.

The intervention would have been more effective if it had addressed the deeper level. Marta should have tried to make clear to Daniel how important it was for her that they stuck to the shared agreement, their timetable. As long as Daniel does not perceive the importance of the problem, he will not be able to take any measures to change the situation.

In a nutshell

When working together with others, you will sometimes experience a co-worker getting stuck with a problem and being unable to see any clear solution to it. Although these people can clearly convey their discontentment with the situation that they find themselves in, they do not end up taking any action to change the situation. Instead of acting, they end up discounting reality, ignoring facts and events, and disregarding aspects and possibilities that are completely clear and obvious to others. These people simply do not take a full and realistic look at the



possibilities open to them. By failing to understand the bigger picture, they are unable to change their situation.

Discounting is a term taken from transactional analysis. A person does not recognise feelings, thoughts, or actions – either in themselves or in others. They simply discount their existence. They may deny, for example, an event that has already taken place. This means that it is not possible for them to take steps to change the situation that they are stuck in.

As a team leader it is important to recognise what level of discounting you are dealing with. This will enable you to select the appropriate measures to support an individual. When intervening, it is important that you are careful not to land in a so-called 'drama triangle' with your attempts to help (cf. tool 'drama triangle').

The four levels of Discounting

Level 4: Discounting personal ability

The person recognises the problem, its significance, and the possibility of change. They do not believe, however, that they can solve the problem with their own abilities.

Level 3: Discounting the possibility of change

The person recognises the existence and significance of the problem, but not that it can be solved.

Level 2: Discounting the significance of a problem

The person recognises the existence of the problem, but not its relevance or significance.

Level 1: Discounting the existence of a problem

The person is not aware of the existence of the problem.

INSTRUCTIONS

The following overview describes the four levels of discounting with the help of examples.

Level of Discounting	Examples
1.) Discounting the existence of a problem	A manager employs people that are similar to each other in terms of their demographics and ways of thinking. She is not aware that her actions are discriminatory. She believes that she is led by objective criteria and skills.
2.) Discounting the significance of a problem	A team member realises that the team is homogenous. He does not believe, however, that this is a significant problem or that it plays an important role. He concentrates instead on the advantages of the situation, for example the way that they can easily understand each other, whilst also downplaying the disadvantages. He can turn a blind eye to the situation by simply describing it as a current trend.
3.) Discounting the possibility of change	A team leader notices problems caused by the homogeneity of the team: the current strengths and weaknesses of the team members are mutually reinforced and multiplied. She recognises that the team would be able to work together better and respond better to the needs of the market if it were more heterogeneous. She thinks, however, that she cannot do anything about this, since this is just the way the job market is at the moment.
4.) Discounting personal ability	A manager realises that others teams that they have contact with are more diverse and more successful. He is convinced, however, that he does not have the patience, the time, or the empathy to hire employees who are different to those in his team.

Making no progress in a development can affect a team member, their entire team, and even their organisation. Or it may affect you personally as a leader. In a situation like this you should start with the individual's, team's, or organisation's level of awareness by using the concept of discounting. An intervention on a higher level of awareness will not have the desired effect. In a team where unconscious discrimination is an issue (unrecognised, discounted existence) it will not work, for example, to draw attention to the importance of inclusive leadership. This intervention could even lead to the team members agreeing that a considered approach to discrimination is important in other teams but failing to see their own need to reconsider their discriminatory behaviour. In this example the first step would be all about creating an awareness within your own team that the problem exists.

As an inclusive leader you are overtly helping your team members to recognise realities and the options that they must react and to actively shape them.

The following guidelines will help provide you with orientation when you are accompanying team members and teams to develop a better appreciation of problems.

- Determine whether discounting is present.
- Identify the level of discounting.
- Determine who is involved. You yourself, one or several team members, the entire team?
- Prepare yourself for an appropriate intervention.
- Implement the intervention.

Guidelines: How can I recognise discounting?

Level 1 - Discounting the existence of a problem

Is the individual aware that

- a situation exists?
- certain events have taken place?
- the reality has changed in a certain dimension?

If the answer is yes, determine the next level of discounting.
If not:

- Clearly state the reality.
- If the reality has changed, show what has changed. Show that the change is inevitable, and that the old reality will not come back.
- Show the objective events.
- Use a language of facts.
- Ask how the individual assesses the situation. In this way you can check whether they have understood the reality that you are making clear

Level 2 - Discounting the significance of a problem

Is the individual aware that the situation

- is important?
- is a problem?

If the answer is yes, determine the next level of discounting.
If not:

- Name the effects of a specific action or failure on reality.
- Show which consequences a specific action or failure has. Consequences may, for example, arise in
    - the individual's personal effectiveness,
    - their relationship to you,
    - their relationship in the team,
    - the team's effectivity,
    - the organisation's costs and profitability.

Level 3 - Discounting the possibility of change

Does the individual see that

- the situation can change?
- others were able to overcome similar challenges?

If the answer is yes, determine the next level of discounting.

If not:

- Show that the problem is more generic and that more people are confronted by it than just this individual. For example, it may be a problem that is also facing their team, their company, and their sector.
- Use facts, for example articles, case studies, discussions on social networks. Draw their attention to reports of other people's experiences and examples from others who faced up to the situation and changed it.
- Widen the perspective. Show how this problem has been effectively solved in their team, their organisation, or their sector.

Level 4 - Discounting personal ability

Does a person think that

- they can solve a situation and bring about change?
- the options currently available to them are applicable to their situation and to the conditions they find themselves in?

If not:

- Help the individual to recognise their influence on the situation.
    - What are they reliant on?
    - What can they do as part of their influence?
- Help them to create a realistic action plan for the short term. Do not create a complex plan that will daunt them. Concentrate instead on short action points.
- Agree on a quick review of the results. Which strategies worked? Which did not work? Use this as a foundation for improving the further course of action.

- Develop a feeling of proficiency together by asking about situations that the individual has faced in the past. Talk about how they handled them back then and which strategies they could use in the current situation.
- If the individual says that an approach is just 'not for them', ask them how they would like to change the approach, so it fits their style of working better.

DAY-TO-DAY SUPPORT

Facilitating Teams

A lack of awareness that a problem is being discounted is not just something that affects individuals. It can also impact teams or organisations. Observe how your team speaks about a situation or a problem. Assess whether the team's strategy or its approach to the problem matches the corresponding level of discounting. This requires some practice.

You might, for example, decide together as a team to introduce a new customer relationship management (CRM) system. You will not make profitable use of the new software, however, if individual team members remain unaware of the entire organisation's need for this new CRM.

When implementing change, do not simply think about the expected result. Think also about the degree of discounting that could take place in the team. It is easy to fall into the trap of skipping work on the team's awareness and inviting those involved too quickly to develop or implement a strategy. There can even be a temptation to do this if the team is not yet aware of the existence or significance of a problem, or if they do not believe that the situation can change.

Listen to the team's objections to change and determine on which level of discounting they are. If possible, try to ascertain the level of discounting within the team in relation to a specific challenge before the meeting and prepare accordingly with a suitable intervention. If discounting becomes clear during a meeting, be flexible and choose an intervention method that corresponds to the level of discounting you have identified.

Think about whether you will not only use the concept of discounting in your own facilitation but will also introduce it to your team so that you can create a collective awareness for challenges together with this approach.

Developing your own character as a leader

Discounting problems is also an issue for inclusive leaders. Discounting will not only stunt your own development, it will also prevent that of your team. If you meet with personal resistance, assess which level of discounting you are currently on. Ask someone to help you apply the discounting approach, or apply the approach described above to yourself.

It is ineffective, for example, if team leaders take part in a training course on inclusive leadership and follow it up with an inclusive dialogue in their team, but do not recognise the significance and value of inclusive leadership themselves. The possibility of applying the skill that they have gained to their daily work is low.

RESSOURCEN

The authors of the method are Ken Mellor and Eric Schiff. The tool is from the Transactional Analysis approach.

Recommended readings:

Mellor, Ken; Schiff, Eric (1975): Discounting; in: Transactional Analysis Bulletin; Vol. 5; No. 3; S. 303-311.

Stewart, Ian; Joines, Vann (2012): TA Today. A New Introduction to Transactional Analysis; Lifespace Publishing.

Bhonsle, Aman (2018): Essential TA: A Common-Sense Psychology. A Handbook of Applied Transactional Analysis; Notion Press.

Free materials on applying transactional analysis tools (inner drivers, discounting) to business can be downloaded from: https://juliehay.org/free-downloads-books-workbooks/

#discounting #change #conflict

14 Scrum

'Don't fall in love with your plan,
it's almost certainly wrong.'
Jeff Sutherland

Benefits

When is this method useful?

→ When you want to develop into a more agile team or organisation, primarily to respond quickly and appropriately to changing parameters.

→ When you want to increase the sense of individual responsibility in the team by letting your team members decide themselves about the right way to reach a goal.

→ When you want to develop into a customer-oriented organisation.

→ When you are looking for an effective opportunity to successfully implement projects in a rapidly changing environment.

→ When you want to minimise the risk of poor investments and wrong decisions and therefore focus on regularly evaluating the intermediate results of work processes so you can respond as early as possible.

From practice

Olivia is a team leader in a consulting company that focusses on NGOs, social enterprises, and public contractors. One of their most important services is comprehensive, scientifically based research and expertise on political, social, ecological, and economic topics that are of particular interest to their contractors.

Olivia has learned to approach new contracts in a very structured way. She likes to make thorough plans. This gives her a sense of security and the feeling that she is working in a well-prepared way. Where possible, it is her aim to take everything into account when awarded a contract. She also demands this approach from her team members. She requires them to describe as accurately as possible how their result will be structured when it comes to new provisions of research or expertise. Her customers also demand this approach, amongst other reasons because they must defend to their supervisors in their own organisations why they have awarded the contract to Olivia and her team. This is only possible if there is a very clear description at the award of contract of what result is to be expected at the end.

Despite her systematic approach, Olivia and her team members have made a repeated observation over the past few years. After handing over their results, usually a comprehensive report of up to 100 pages, they receive praise more rarely than they used to for their high-quality work. Their customers, for some of whom the team has been working for several years, are no longer as content as they used to be. Although they are working just as professionally as they did before, their customers now increasingly respond with statements such as: 'The report is good, but we expected more on one aspect or other.'

Olivia's team members express their disappointment about this kind of feedback at their team meetings. They are not used to this and ask what they could do differently. Harry was recently hired as a new team member. Before starting this new post, he completed an online training course on Scrum since as a certified PRINCE2 practitioner he wanted to expand his previous knowledge about traditional project management methods with an agile approach to project management. At the first team meeting with Harry, the topic of customer satisfaction was again brought to the table. Harry had a simple explanation for this and a suggestion: 'During the three to six months that we generally need for our research and development of the report, we should get in touch with our contractors at least once a month to inform them about our ongoing work and our progress. This maybe unfamiliar for us and our contractors, but I'm sure that we will raise our customer satisfaction back to its usual level with this simple measure.'

The team let Harry explain to them why he thought they would succeed with this approach. He briefly explained the key components of Scrum, including the concept of working in so-called 'sprints' of one month at most. Harry explained that in Scrum the current interim results are discussed with the contractor. His new colleagues argued that they couldn't imagine their contractors from public departments, for example, agreeing to spend several hours with them each month to catch up on the progress of their work. 'They just want a good result at the end. In the meantime, they don't want to have any work with us,' they claimed.

Olivia is well aware of this attitude amongst her circle of customers, but Harry had still aroused her interest for the more agile Scrum approach. Although she had often heard of Scrum, up till now she had thought that this way of working was better suited to the IT sector where Scrum was originally developed.

Olivia and her team took a closer look at the philosophy behind Scrum. Harry was asked to prepare a short informative workshop to share his new knowledge about Scrum with his colleagues. At the end of the workshop, Olivia asked whether there were aspects of Scrum that they as a team could use right away, even if they did not want to immediately introduce the entire method for their work together. They identified the Scrum components together that they wanted to try out directly: Olivia and the project manager in charge of each customer contract now contact their contractor at least once a month for an informal online chat. For this conversation they think about a specific factual question that is currently occupying the team carrying out the research. They use the meeting to briefly report what stage the work is at. The most important aspect of the conversations, however, is to find out how the contractor reacts to the interim results they share and to see whether they express any new interests, wishes, or ideas that were not communicated when the contract was awarded.

After half a year, the team took stock and discussed the results of the brief monthly update conversations with the contractors. Everyone agreed: customer satisfaction had increased again. Some customers had even mentioned that the brief online chats had been particularly valuable because it had led them to new ideas. They praised the flexibility with which Olivia's team took on new suggestions throughout the duration of the contract.

Olivia reported the positive results of her experimental phase with individual Scrum components to the leadership team in her company. In the future, she and her team would like to be the first team in the company to work in accordance with this method.

In a nutshell

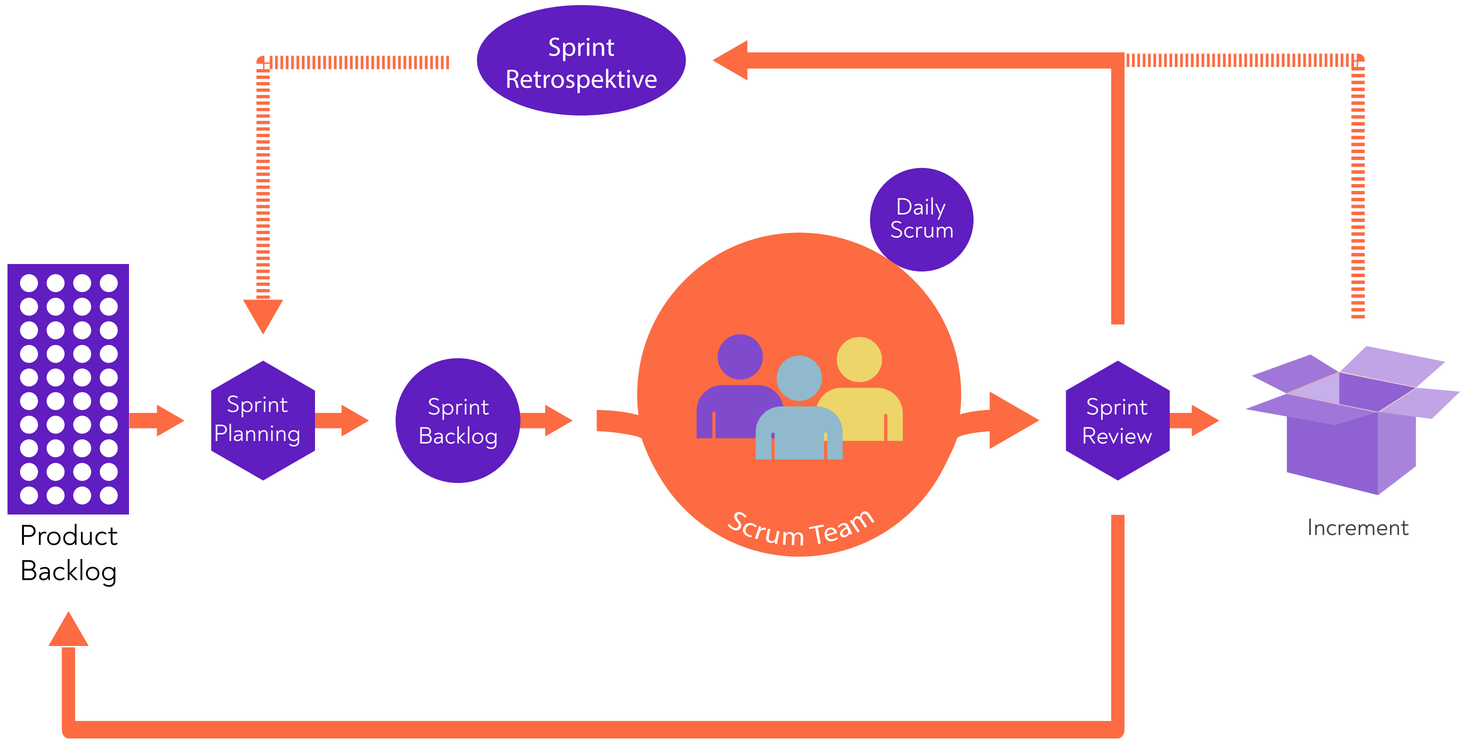
Scrum is currently the most well-known agile project management method. Scrum comes from the software industry but is now being used in many other sectors outside of software development. The name originally comes from the sport of rugby. Scrum is an abbreviated form of 'scrummage' and refers to a moment in the game where the players come close together. This situation is all about agility, dynamism, and communication. This is what Scrum stands for. The foundational principles that take centre stage in Scrum are:

- iterative, incremental action, where useful increments are developed as quickly as possible rather than completing and presenting the final result at a much later date.
- consistent orientation around customers, rather than ensuring that the original plan is implemented as exactly as possible.
- self-organisation instead of central (project) governance.

These three aspects are also pertinent for INCLUDE. Scrum makes it possible to succeed in a volatile and uncertain business environment where the expectations of your customers and target group are changing and creativity is required. Scrum creates a working structure based on understanding, self-organisation, the improvement of quality and pace of work, and learning from experience. Applying this method will enable a team to respond flexibly to new expectations and circumstances. Scrum is one possible answer to the challenges associated with technological acceleration, the constant search for innovation, and a rapid rate of work with the pressure to perform.

Scrum can be implemented anywhere where the aim is to increase productivity and achieve better results so that suitable solutions can be developed in close consultation with customers or target groups. The method offers a good starting point for systematically increasing the agility of a team or organisation. In the context of INCLUDE, 'agility' means understanding the ability of an organisation to respond appropriately and flexibly to changing parameters. In this sense, agility is a significant requirement to ensure an organisation's long-term survival.

Scrum in a nutshell*



* Source: Scrum.org.

INSTRUCTIONS

Scrum Foundations

According to the Scrum guide, a handbook authored by Ken Schwaber and Jeff Sutherland (see 'Resources'), the method is based on the following foundations:

Transparency: the possibility for all participants to follow the (project's) progress. Information is available to everyone.

Inspection: incremental, iterative action. A cycle of iteration is described as a 'sprint'. Progress is regularly inspected in light of the goals of the corresponding sprint cycle.

Adaptation: the ability to respond to changes and learn from experience is part of the process. The team constantly gains new experience. If something needs to be changed, this can already be implemented in the next sprint cycle.

Why is Scrum different?

Agile projects are three times more likely to succeed than so-called waterfall projects, in other words projects that are implemented with traditional project management methods. The Standisch Group reached this conclusion in their Chaos Report from 2020 (see 'Resources'). In addition to this, the likelihood of a waterfall project failing is twice as great. The study defines success in terms of meeting deadlines, on budget, according to plan, to the satisfaction of the users.

The main differences between the Scrum and waterfall approaches to project management

Scrum	Waterfall
• The project is implemented iteratively, one step at a time.	• The project is implemented linearly in a traditional way.
• The end product can still be changed. It is not completely clear what the end product will look like.	• The end product is very clearly defined. The entire project is planned in advance.
• Certain steps crop up numerous times. There are short work cycles ('sprints'). The project requirements can change over time.	• Moving on to the next phase means that the previous phase has been completed. Each phase of the project is only worked through once.
• Planning for immediate, short-term goals. Concentration is thereby on attainable added value, not on the extent of the work.	• Implementation is built on a very precisely defined plan. The project requirements are defined at a very early stage of the work.

• Testing is a fixed component of every 'sprint'.	• The test phase starts once the development work has been completed.
• Documentation has no priority.	• Very precise documentation is created.
• Close cooperation with customers throughout the entire process.	• Customer contact occurs in the phase of gathering requirements, when presenting milestones, and when handing over the finished product. During the development stages the team works without contact to customers or target groups.
• Changes are expected and therefore require a flexible approach.	• Changes to the project must be agreed via official channels.

Scrum terms that you should know

Scrum has its own vocabulary that you should adopt it you want to work with the method. Most of the technical terms are used in English.

Scrum artifacts

Scrum artifacts are primarily there to make all important information transparent for the participants. Artifacts are all 'tangible' products that are developed in the Scrum process. These are especially the project documents such as backlogs and the individual increments that make up the overall outcome.

Product backlog: this is a structured list of all elements or requirements that should or could be implemented in the product under development. Requirements for changing and improving the product are also listed here. This list is not final. It can be expanded with new elements to create a functional product.

Sprint backlog: in the sprint backlog the tasks are listed that (should) be carried out in the current sprint. These tasks are chosen from the product backlog. The sprint backlog contains the plan for producing the next increments (see 'increment') and for reaching the sprint goal. Planning is based on a prognosis (see 'sprint planning'). It is adaptable if it can be ensured that the sprint goals are thereby achieved.

Increment: since the end product with Scrum is iterative, produced one step at a time, the product develops incrementally in every sprint. With software, for example, a new function would be added that had originally been described in the product backlog. This new function represents an increment, in other words a partial result. The entire product consists of all increments that have been completed in the current sprint and in all the preceding sprints.

Scrum Team

People developing something together take centre stage in Scrum. Scrum aims to enable the most successful cooperation possible for all participants. The method capitalises on flat hierarchies, where the effectiveness of the team is more important that the effectiveness of the individuals involved. A Scrum team consists in a product owner, the development team, and a Scrum master.

Product owner: a product owner is responsible for the success of the project. In this role, they represent the interface between stakeholders and the development team and ensure that the product to be developed offers the greatest possible value for the customers. The product owner is responsible for the product backlog. One main task is to convey, inspect, specify, approve, prioritise, and manage the requirements for the product. This is done with the help of all participants.

Development team: a Scrum development team works in a self-organised way. It is responsible for completing an increment at the end of each sprint (i.e., an incremental phase of work). To achieve this, the development team plans each sprint and manages the sprint backlog. A development team usually consists of 3 to 7 people.

Scrum master: this team member is responsible for the effectiveness of the Scrum team. A Scrum master ensures that the team is working on the foundation of the Scrum method. Scrum masters are leaders who serve. They help the team to concentrate on creating valuable increments, focus on overcoming obstacles blocking the team's progress, and ensure that all Scrum events are productive.

Scrum Events

The iterative nature of Scrum is based on work in sequential **sprints**. These sprints are the real heart of the method. Each sprint contains all Scrum events, namely sprint planning, daily Scrums, a sprint review, and the sprint retrospective. Each of these Scrum events offers the team the chance to inspect and adapt the Scrum artifacts, in particular the backlogs. Depending on the project, each sprint lasts between a week and a month at most. Fortnightly sprints are a typical rhythm. Once a sprint has finished, the next sprint can begin.

Sprint planning: this is a meeting that is limited to 8 hours at most. During the sprint planning, the entire team decides which increments should be completed in the coming sprint (What is achievable?) and how this work can be completed by the team together (Who will do what?).

At the end of the sprint planning, the development team will be able to explain to the product owner and the Scrum master how it plans to achieve the sprint goals in the following sprint in a self-organised way, and how the work on the next increment will be organised.

Daily Scrum: the purpose of daily Scrums, in other words daily Scrum meetings, is to constantly inspect progress towards the sprint goals and create a plan for the next 24 hours. Daily Scrums enable ongoing transparent communication in the team and the identification or quick removal or obstacles and challenges. At the same time, these short talks render longer meetings obsolete.

A favoured form of daily Scrums is a 15-minute stand-up team meeting. Standing, rather than sitting on comfortable chairs, protects the team from long discussions. During the meeting, each team member will speak in turn and answer the following questions:

1. What did I do yesterday to help us reach our sprint goal together?
2. What will I take care of today for us to reach our sprint goal together?
3. Is there anything that could block my progress?

When obstacles or challenges emerge, these are not discussed or solved during the meeting. The participants simply agree how they want to support the person who is faced with a challenge. Conversations about finding a solution usually happen immediately after the daily Scrum in bilateral conversations or in smaller groups.

Sprint review: the purpose of this Scrum event is to inspect the results of the sprint and to agree on adaptations where necessary. To achieve this, the development team will present the results of the sprint to all stakeholders, especially the contractors, and will explain where progress has been made and what challenges were faced along the way. The focus is on the team's successes and their next steps. The product backlog is adapted on the basis of the sprint review.

The Scrum handbook describes the Sprint review as an informal meeting. Introducing the increment should take centre stage. All participants are encouraged to give feedback so that the Scrum team has valuable input for the next stage of their work.

Sprint retrospective: the sprint retrospective always takes place between the sprint review and the next sprint planning meeting. This internal team event is there to analyse the Scrum team's work together. Its aim is to identify and immediately implement potential areas for improvement in the next step.

Implementing Scrum – what to bear in mind

Before you decide to work with Scrum in your organisation in the future, you should think through certain aspects. Officially introducing Scrum requires an extensive intervention into

your organisation's structures and processes. You should therefore think carefully when making this decision.

Scrum as a synonym for agility: Scrum is first and foremost an internationally recognised project management method that offers an alternative path to the specific disadvantages of traditional waterfall project management methods such as PRINCE2, PMI, IPMA, or PM2. With Scrum, project teams can respond with greater agility to changing parameters and new requirements. This agility is the primary advantage of Scrum, which makes the method of interest as a new leadership tool even beyond its use in project management.

Anyone wanting to use Scrum in the context of a contemporary leadership approach in an age of digital change will thereby particularly increase the agility of a team or an organisation. Agility means the ability to respond to new challenges and opportunities in a way that is well prepared and flexible. Anyone talking about Scrum is talking about agility. Anyone wanting to achieve more agility in their own organisation can use Scrum for this. You must decide whether you would like to introduce the method 100% or if you could even achieve a greater measure of agility by only partially implementing Scrum.

Scrum changes organisations: introducing Scrum will affect more than just your 'project management'. It represents a fundamental shift away from top-down management to self-organised teams. Scrum requires a new way of working, in which leaders and team members must redefine the terms power and responsibility. A large part of the work that was previously reserved for leaders (setting goals, planning, motivating, monitoring) is taken over by Scrum teams independently.

Officially introducing Scrum is an option when you are already working in a highly qualified team with enthusiastic team members who have a clear focus on excellence and want to keep improving. However, if your organisation has been led from the top down so far and your team members think of themselves more as recipients of instructions, then you should think carefully about how and whether Scrum is the right method for you right now. In this instance it is advisable to begin with the other tools in the INCLUDE handbook to improve your requirements for successfully introducing Scrum.

Working together differently with customers and target groups: Scrum ensures that you actively involve your customers or target groups in the process of providing a service. These stakeholders need to want that. If you primarily work for clients that expect you to deliver a high-quality product that is ready for operation or immediate use, then Scrum is less well suited as a method.

Developing and continually improving Scrum know-how: although the Scrum handbook is barely 20 pages long, implementing Scrum is not easy. Scrum is easy to understand, but its practical application is complex. This is also one reason why introducing Scrum to an organisation can fail. In general, you will need the support of external experts and should place an emphasis on consistently developing and permanently improving your team's Scrum know-how. Successfully introducing Scrum requires time. Challenges in the course of this process should be viewed as learning opportunities for you and your team. Introducing Scrum requires commitment from all team members. You need the right team players for this to work.

Starting with one Scrum team: to what extent should you introduce Scrum? Should the method be established in a team, an area, or in the entire organisation? One proven approach is to begin by introducing Scrum first in a team that is well suited to it. Only when you have had some initial positive experiences should you expand the application of this method to other teams.

Expanding Scrum to larger organisational groups is a challenging process that you shouldn't start if you still have to overcome challenges on the level of individual teams. Please bear in mind that the Scrum guide is not designed for complex systems beyond the team level.

A popular way to scale up Scrum within organisations is the Scrum of Scrums approach (see 'Resources'). INCLUDE leaders who also want to introduce agile Scrum structures beyond individual teams should, however, first deal with the tools 'beta codex' and 'cell structure design' in this chapter before expanding Scrum to their entire organisation. You should know these two tools in combination with the INCLUDE step-by-step approach as described in chapter 4 before making a permanent change to the structures and processes of your organisation by expanding Scrum beyond its originally intended area of application.

Optimal Scrum team size: one reason why Scrum is so successful is that the minimum and maximum number of people that can belong to a Scrum team is clearly defined. Having too few people results in not enough heterogeneity or variety of knowledge. If the team is too big, by contrast, it is no longer able to work as quickly, flexibly, or efficiently. Jeff Sutherland states that 7 people plus or minus two is a good orientation for any Scrum team.

People must fit their Scrum roles: when filling the roles in a Scrum team, you should make sure that the people you choose fit the role requirements. A Scrum master should be someone with the qualities of a servant leader who is happy to orient themselves around the needs of the Scrum team. People who are familiar with the INCLUDE approach and who put this into practice can generally fill this Scrum role well.

A product owner represents the team to the outside world and is otherwise reserved in day-to-day work. Product owners should be able to assert themselves and focussed on the goal at hand. For this reason, people with a pronounced need for harmony and team belonging will perhaps find it difficult to slip into this role.

Technical infrastructure: to use Scrum in in-person or remote teams, you will need a suitable technical infrastructure. A Scrum team needs a shared space – physical or virtual – to be able to work well. Jira, supported by Confluence, offers one common software solution to this. You can find further tips on software solutions in the 'remote work' tool in this chapter.

DAY-TO-DAY SUPPORT

Using agile concepts such as Scrum involves changes to your working processes and structures that you should consciously grapple with.

Communication in autonomous teams

Scrum teams act in a self-organised way. Employees assume greater individual responsibility and their loyalty gradually shifts towards team solidarity. The ability to work as a team is an important success factor in Scrum. In this working environment it is critical that all team members can communicate openly with each other. Interpersonal conflicts will not disappear simply because you are using Scrum. You should provide your team with tools to be able to productively deal with conflicts and tensions. The tools 'inclusive communication' and 'giving and getting feedback' in this chapter are particularly well suited to this.

Not just agile on paper

'Agile leadership' is one of the most used management buzzwords of our time. It is not uncommon, however, for 'agile' simply to serve as a way of giving familiar concepts a new, somewhat more modern coat of paint – something along the lines of starting with the word 'agile' and transforming an old hat into a new management concept. When implementing Scrum and other agile approaches, make sure that you are not just increasing your agility on paper.

Scrum and 'agile' are not cure-alls for dilapidated organisational systems. If an organisation's leadership is not prepared to work on their system, then Scrum can simply become an 'agile' pretence to ward off actual resistance to the much deeper and necessary changes that an organisation has to make.

Avoid instrumentalising Scrum to gain time and end up having to change as little as possible. This stands in opposition to the INCLUDE approach. Only those who are serious about self-organisation, individual responsibility, the ability to make customer-oriented decisions, and a changed understanding of power in an organisation should use the word 'agile'. Anyone simply introducing Scrum or 'agile' on paper runs the risk of having discontented team members

Your Scrum buffet

You can employ individual components of Scrum without implementing the entire method. Think about which Scrum components you would like to test in your organisation, perhaps even straight away. Small enterprises or organisations with fewer than 10 employees have, for example, had good experiences with an adapted daily Scrum that is conducted at the same time each morning online. Questions for a short daily meeting, which all team members are required to attend, could be: 'What result did I accomplish yesterday?', 'What will I achieve today?', and 'From whom do I require help today to achieve my daily goal?'. Scrum offers you a variety of options for adaptation that you should analyse together with your team.

RESOURCES

Scrum is a project management method that was designed by Jeff Sutherland and Ken Schwaber from 1993 onwards, aimed especially at agile software development.

Schwaber, Ken; Sutherland, Jeff (2020): The Scrum Guide. The Definitive Guide to Scrum. The Rules of the Game: https://scrumguides.org/. The current version of the Scrum Guide from November 2020 is available free of charge as a PDF. You should start with reading this short document if you are interested in Scrum.

Sutherland, Jeff (2015): Scrum. The Art of Doing Twice the Work in Half the Time; Random House.

Rad, Nader K. (2021): Agile Scrum Handbook; Van Haren Publishing.

Appelo, Jurgen (2010): Management 3.0. Leading Agile Developers, Developing Agile Leaders; Addison-Wesley Professional.

Rubin, Kenneth S. (2012): Essential Scrum. A Practical Guide to the Most Popular Agile Process; Addison-Wesley Professional.

Scrum online: https://www.scrum.org/

Video: What Is Scrum? (An Agile Cartoon):
https://www.youtube.com/watch?v=m5u0P1WPfvs

Video: Jeff Sutherland TEDxAix: Scrum. How to do twice as much in half the time?:
https://www.youtube.com/watch?v=s4thQcgLCqk

Spanner, Chris (no year specified): Scrum of Scrums:
https://www.atlassian.com/agile/scrum/scrum-of-scrums

The Standish Group (2020): CHAOS Report. Beyond Infinity. PDF requiring payment:
https://standishgroup.myshopify.com/collections/frontpage/products/chaos-report-beyond-infinity-hardcover-printed-version

#agile #scrum #project management

#self-organisation #responsibility #transparency

15 Consent Decision-Making

'In democratic structures individuals are outvoted,
in sociocracy every opinion is taken into account.'
Ludwig Kannicht

Benefits

When is this method useful?

- When you want to make decisions in your team that will increase or introduce individual responsibility and self-organisation
- When you want to solve a complex problem without barriers being erected against the decision.
- When you want to practice decision-making with the participation of all those involved without falling into a never-ending discussion.
- When you want everyone to be heard and objections to be taken seriously when making decisions.
- When you want all those involved to take responsibility for the collaborative decision and for everyone to go along with it. This will make it easier to implement.
- When you want to establish more democratic ways of making decisions without coming to a standstill.
- When you want all team members to be involved in important decisions and, at the same time, you want your organisation to function effectively.
- When you want all decisions to be 'safe enough to try' and 'good enough for now'.

From practise

Didi has been involved in an NGO for several years that has taken on the task of caring for refugees in her city. The organisation began as a private initiative and grew increasingly professionalised over the following years as a charitable organisation. One feature of the charity's work is that the core of around ten long-term committed members is joined by several helpers who, depending on the current political situation, are more or less there in a voluntary capacity. This voluntary work needs to be coordinated. These volunteers offer their help when acute emergencies arise amongst the refugees.

One year ago, Didi took over the role of managing director in her charity. Since then, she has led both the work of the board and the team of volunteers. Since taking on the work of the board, Didi's enthusiasm for the shared work has noticeably dropped. She works together on the charity's board with two other long-term co-workers, who mainly meet her ideas for developing the charity with a lot of scepticism. It often happens that her suggestions are outvoted by the other two people, or that the discussion comes to a standstill because they cannot agree on a way forward together. These blockades demotivate Didi, especially because she has the feeling that her co-workers on the board are less concerned with getting things done than with making sure that as little as possible changes in the charity's situation.

Thankfully, Didi gets to know Allessandro, a new committed member, who began to be involved in the charity as a volunteer two months ago. Allessandro knows an interesting way of making decisions that he learned from his professional work in an IT company. He claims that this procedure can help to remove the kind of blockades to decision-making that Didi is currently experiencing. Didi seizes the opportunity and, with Allessandro's help, tests so-called consent procedure first in her function as a leader of the voluntary work. Allessandro says that he is happy to moderate an initial decision that Didi would normally have to make alone, so that everyone in the team of volunteers can participate in the decision. Didi and everyone in the team, despite their own reservations at the start, were soon convinced that the consent method works. One positive side effect was that the number of voluntary activists also grew further as word spread in the local area that everyone's experiences and opinions were listened to when it came to the voluntary work.

The positive word-of-mouth propaganda meant then Didi's co-workers on the board also noticed how successfully the team of volunteers set up their care for people from Ukraine who had fled from the effects of Russia's attack on their city. Didi was interviewed, amongst other things, by the regional paper about this issue. This led to other civic charities getting in touch with her, wanting to find out more about the consent procedure. The best outcome for Didi personally, however, was that both of her co-workers on the board were willing to make important decisions together in the future with consent. They agreed to implement the procedure in the coming six months on a trial basis and then to decide together whether they would like to keep going with it.

In a nutshell

The consent procedure is particularly well suited to making important decisions together as a team. If a decision-making situation is confusing or complex, for example when it comes to questions regarding an organisation's digital transformation, then the consent method is particularly apt. In general, no single person in a group is capable of completely surveying all information and decision-making possibilities when it comes to fundamental decisions. With consent decision-making, you can use the intelligence of the entire group without falling into endless and fruitless discussions. Consent is more democratic than democracy, where individuals find their differing opinions to be outvoted by the majority. Consent decision-making, by contrast, uses precisely these individual objections to reach a suitable solution collectively. The structured approach of consent decision-making ensures that the decision does not come to a standstill.

Specifically, consent means: 'I do not have any substantial objection to the current proposal in light of our common goal.' You therefore do not have to vote for a draft proposal with 100% conviction, but you can still agree that it be implemented. This gives more room for manoeuvring and opens options that go beyond the 'lowest common denominator'.

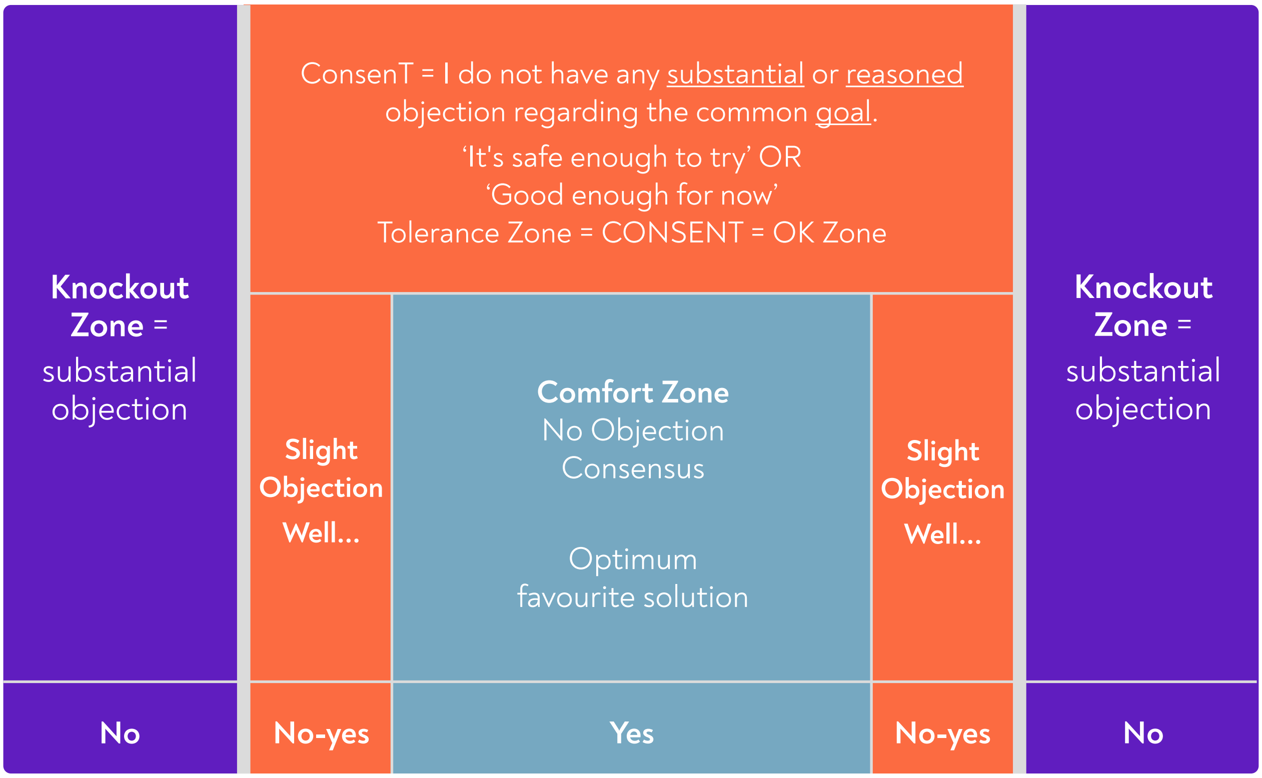
A 'substantial objection' is present in the following situations:

- 'I cannot or will not implement this decision because…'
- 'This decision will pull us away from our shared goal because…'
- 'This decision will damage us as a team or an organisation because…'
- 'We cannot reverse this decision in the future or make any necessary adjustments because…'
- 'This decision would lead to consequences that we should avoid because…'
- 'There will be no significant improvement as a result of this decision that would justify the effort required because…'

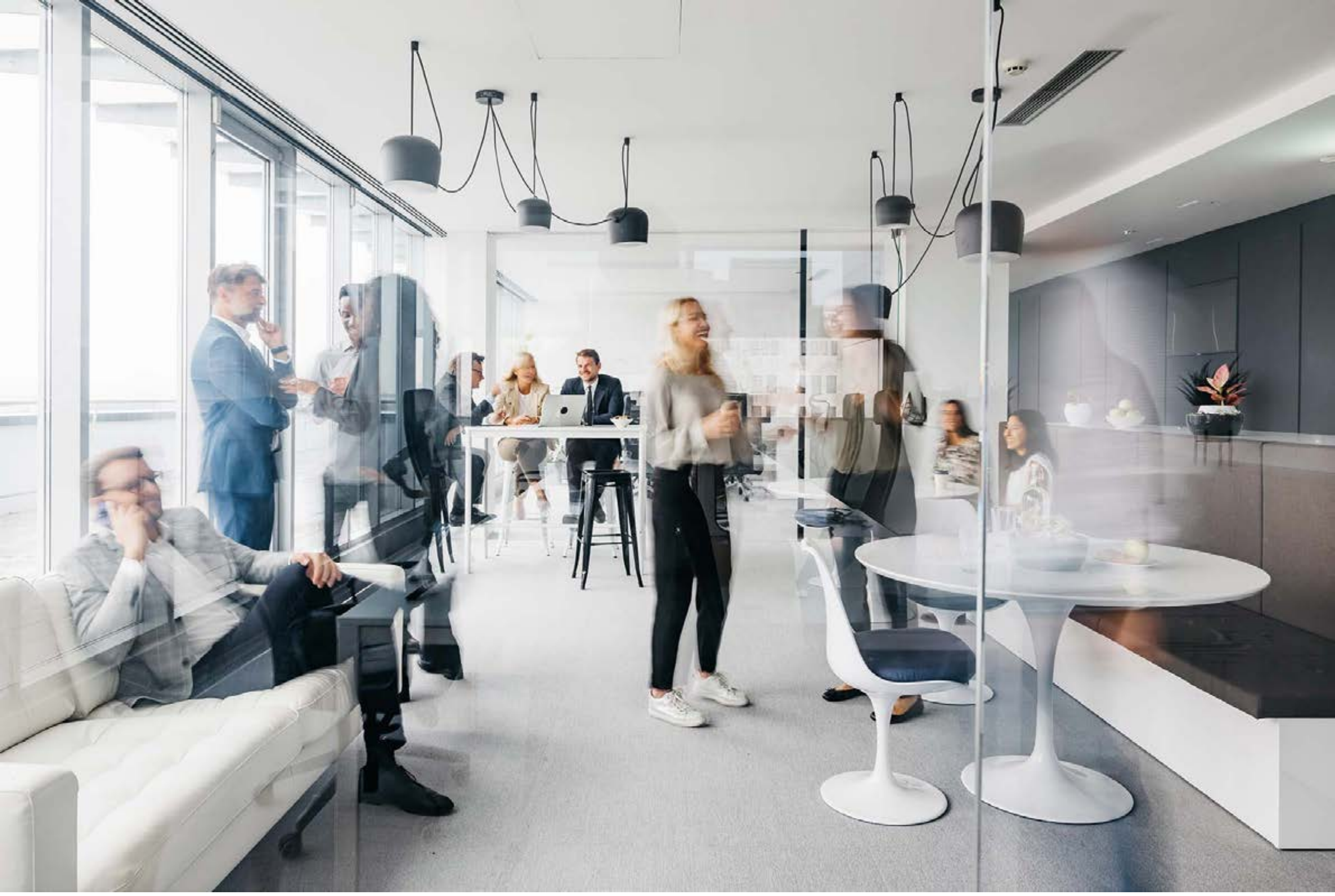
In the consent procedure, a 'substantial objection' is not the same as a veto. Anyone who raises such an objection must substantiate it with factual arguments. 'Substantial objections' are treated in such a way in consent procedure that the one raising the objection, or the entire group, is responsible for finding a solution that satisfies the 'substantial objection'. In effect, this means: 'We may have overlooked something important and must potentially integrate this argument in our solution.'

In addition to this, the flexibility of the consent method is based on two further principles that are foundational for any consent decision. All decisions made with consent must be 'safe enough to try' and 'good enough for now'. This means that the implementation may not carry any obvious, substantial negative consequences and that participants need to be content with not aiming for an optimum solution but for a solution that is good enough based on the available information in the current situation. Both principles in tandem ensure that a team's or an organisation's ability to act is preserved – even in challenging decision-making situations.

Overview of the Consent Method*



* This graphic has been used with the friendly permission of Christian Rüther (www.soziokratie.org). You can find more information about this author in the resources section.



INSTRUCTIONS

Sociocracy: Not new, but contemporary

The consent decision-making method is a central element of sociocracy. Christian Rüther, one of the most distinguished sociocracy insiders in German-speaking Europe, summarised the benefits of this organisational model in this way: 'Everyone's opinions and ideas are taken into account, and yet decisions can still be made quickly.'

The term 'sociocracy' is derived from the Latin term 'socius' (companion) and the Greek word 'kratein' (to rule). As an organisational model, sociocracy is not as new as most people assume when they hear about it for the first time. The concept can be traced back to the Dutch entrepreneur Gerard Endenburg, who began to search for a modern organisational concept at the end of the 1960s. He struck gold when he came across the Dutch social reformer Kees Boeke. Endenburg linked his experiences from the cybernetic sector to Boeke's approach and implemented his first sociocratic concept in the electronics business that he had taken over from his parents.

Endenburg had a pivotal experience in his company before he struck out towards sociocracy. At a staff meeting he lost all sense of what was going on. The leaders and employee representatives were fiercely fighting with each other, and Endenburg thought to himself: 'There must be a better way. A way that we can walk together, rather than fighting against each other.' That was the starting signal. Today, not just small or medium-sized but even larger organisations and enterprises with several 100 employees are working across the world based on this organisational concept that Endenburg discovered. One of the central ideas used by sociocratic organisations is making decisions with the consent method that is introduced here in detail.

The basic principles of sociocracy

The sociocratic approach is based on several basic principles that can be summarised in the following way:

1. **Reasoning instead of (powerful) positions:** No one should make a decision based solely on a (powerful) position. The opinions and especially the objections of all those involved are listened to and feed into the decision-making process. It is important that the better argument counts.
2. **Facilitating rather than dictating:** Making decisions in line with the consent principle can be moderated by a leader, but it doesn't have to be. A moderator will take charge of guiding the participants through the decision-making process. It is important that the moderator does not determine the outcome. The moderator's most important task is to ensure that all opinions and reasons really are expressed and that the individual steps of consent decision-making are followed.
3. **There is no 'No' without justification:** A decision can only be prevented by someone bringing a substantial and well-grounded objection. A substantial objection is present if the proposed decision would bring the envisaged goal or even the existence of the organisation into danger. If such an objection is raised, then the one who made the objection, together with all of those involved, must find a possible solution to satisfy the objection.
4. **New opinions or positions are a sign of learning organisations:** It shows that the method is working if, during a consent decision-making process, some of those involved or even the entire group conclude that the positions they used to hold are no longer tenable. A leader who, for example, admits that they were mistaken in their assessment of the situation, will not be seen as weak but as up-to-date and able to learn. The more that those involved openly admit their own processes of learning, the clearer it will become that the whole organisation is learning.
5. **Do more with 'good enough':** The central focus of consent decision-making is finding a feasible and suitable solution. It is not about finding the optimal solution or the perfect approach. Everyone searches together instead for a sensible solution based on the available information, whilst considering the resources at their disposal. The motto is: do more with 'good enough'! This means making and implementing quicker decisions rather than endless procrastination – even if these decisions are not perfect.
6. **Everyone is jointly responsible:** Responsibility is not carried simply by the leaders. Statements such as 'Our boss just did something really stupid again' are no longer possible with consent decision-making. Everyone in the organisation can and must play their part. All those involved are requested to express their ideas and concerns. Anyone who doesn't do this is jointly responsible for failures or working conditions that are considered suboptimal. The consent method offers organisations a feasible way of encouraging everyone to take responsibility in their day-to-day work.
7. **Handling information openly:** Anyone who should contribute to the decision must have the relevant information at their disposal. Transparency is the key word here. If an important investment, hiring a new team member, or dealing with an economic crisis are being discussed, for example, then everyone needs to know how the company's figures are currently shaping up.

Foundations of consent facilitation

The hallmark of sociocratic organisations is the fact that decisions are not made from the top down by those who are higher up in the hierarchy. When it comes to consent, there are also no majority decisions. There is no need to reach a joint decision, to decide consensually. Consent decisions are different. To find a feasible and suitable solution that takes all substantial objections into account, you simply need a moderator who is up to the task. This may require some practice on their part.

Successfully making decisions with consent is based on some important foundations that are briefly outlined below:

- The moderator is selected. They can also be a 'normal' member of the staff meeting at the same time, meaning that they can also contribute to the decision. Where this is the case, they must be careful to clearly distinguish between the two 'hats' that they are wearing.
- The moderator leads the meeting and ensures that the principles of consent moderation are observed. They can make decisions about the process depending on the situation in each of the individual consent steps.
- All members of the consent meeting are responsible for solving the problem or making the decision.
- There is little discussion. It mainly consists in several passes round the circle, as those involved each have a chance to speak in turn.
- The focus is always on reasoning or on aspects of a solution.
- The focus is on feasible solutions, i.e., 'do more with good enough'!
- A feasible solution or a good consent decision is 'safe enough to try' and 'good enough for now'.
- The moderator writes down or depicts their suggested solution.
- The moderator asks all those involved to clearly identify the common goal in their individual decision, especially when they agree on a decision proposal. For example, 'With regard to our common vision 'XYZ', I have no serious objection.'
- There are no mistakes or wrong opinions when it comes to consent decision-making. The moderator has the task of cultivating a positive culture of mistakes. This includes clearly welcoming any new contributions from the individuals involved.

Making joint decisions with consent – explained step-by-step

Teams of up to 10 members are well suited to making consent decisions. Consent moderation is divided up into different phases. It is a good idea to visualise the individual steps for everyone to see when introducing the method to your team or if moderators with less experience are being introduced to the method. The steps on the way to consent are:

Step 1: Preparation and suggestion

A consent decision should be well prepared. Start by choosing a moderator. There are two options here: the moderator can either be 'neutral' or can simultaneously be a 'normal' member of the group who is entitled to join in the decision-making process. The role of moderator should change as often as possible, and both 'normal' team members and more prominent people, such as a managers or team leaders, should regularly take on the role of moderator. When trying out consent for the first time it is advisable to choose someone who is perceived by the whole team to be an experienced moderator.

Once the moderator position has been filled, it is time to start right away. It is worth taking some time to transition from the normal working environment to the consent world. Short question rounds are ideal for this, for example where everyone answers the following questions: 'How am I doing right now?' and/or 'What am I particularly focussing on right now?'. Further logistical aspects can then be sorted out, for example who will take the minutes of the meeting and how comprehensive they should be. Are there important pieces of information that everyone needs at this point? How will you deal with interruptions, for example phone calls? How long should the meeting last and will there be breaks? You can go without setting time limits when first introducing the consent method. The most important thing at the start is to simply experience the consent method. Whether the process took too long, required an appropriate length of time, or could even be decided surprisingly quickly is then an important part of the evaluation or reflection (step 6).

Before moving on to step 2, the moderator needs to clearly state the decision at hand. This could be done, for example, by introducing a potential resolution. An appropriate draft resolution for launching the consent method in your organisation would be, for example: 'We jointly resolve to use the consent method for important decisions in our organisation.' Another example of a decision that you could use to promote your digital transformation would be: 'We want to introduce a CRM system (Customer-Relationship-Management) to our organisation so that the needs of our customers take centre stage.' The suggestion for a potential action or a task to be jointly solved will then be dealt with one step at a time in line with the sociocratic consent method.

Step 2: Information round

This step is all about helping all participants to understand the decision-making options or the task at hand as well as possible. It is important to visualise the information, for example by working with Metaplan boards for in-person meetings or with the appropriate virtual tools if meeting online (for more information see also the tools 'remote work' and 'how to conduct online meetings' in this chapter). The initial focus will be on the following questions: 'What is this all about?' and 'What is our goal?'.

This is all about gathering the relevant information so that those involved can come to an informed opinion and can develop criteria and reasoning about the proposed decision. The focus is on numbers, figures, facts, quantifications, and previous experiences. The more complex the situation, the clearer it should be to all those involved that they are deciding with consent – precisely because there is so much uncertainty about the right way forward.

It is very likely that not all the relevant information will be present or available. This is particularly the case when decisions about the future must be made, for example in the topic area of 'digital transformation', since reliable forecasts are either hard to get hold of, if not even impossible. Who wants to predict with certainty the role that 'artificial intelligence' will actually play in the economy and society in the future (for more about this see 'digital transformation tool' in this chapter)? Consent accepts that the available information is incomplete when people are forming their opinions.

The moderator will generally round off the information round with the following questions: 'Are any important pieces of information missing for all of us to understand the situation?' and 'Who here needs further information to be able to form an opinion?'. At the end of the information round, all participants will once again be explicitly given the chance to pose any follow-up questions.

Step 3: First opinion round – let it all out

All participants now have the opportunity to share their opinion for the first time. The most important thing is that they all have an equal chance to speak. To this end, the chance to speak is passed round the circle. Everyone has an opportunity. The fact that everyone knows they will be heard prevents tedious and controversial discussions. That is intentional. There is no discussion. This approach makes it possible to focus on the individual arguments and contributions. No one is interrupted or criticised, and the individual contributions are not evaluated.

The key questions in this initial opinion round are: 'How am I personally doing with this suggestion or this decision-making situation?', 'How do I feel about this?', and 'These are my arguments, or this is my central argument…'. During this phase the moderator is very reserved and takes notes on every statement.

Step 4: Second opinion round – moving towards a decision

The second opinion round gives all participants the chance to respond to contributions from the first round. All those involved generally question the opinion they initially expressed based on other people's contributions. Listening during the first opinion round usually results in new impressions, ideas, or conclusions that they may not have initially taken sufficiently into account. The second round, during which people speak in turn around the circle, offers the chance for people to develop or change their own stance, and to share these changes with others. Groups that already have some experience with consent decision-making will often unconsciously use this phase to develop the argumentation so that it becomes easier for the moderator in the following consent phase to come up with a draft proposal that fulfils the consent criteria. In football language, this leads to a real 'goal assist', so that the group in the next step ideally has a 100% chance of 'converting' the score.

In this round, the central questions are aimed at giving a voice to changes in opinions that have been formed. To this end, the moderator will ask all participants: 'How are you feeling about what you have just heard?' and 'What has changed in your feelings or your stance?'. The moderator is once again tasked with allowing everyone to speak. It is also important for the moderator to note down all suggested changes regarding the decision being made, as well as new important insights and all relevant objections. This requires a great deal of concentration.

Please remember that, although contributions in both opinion rounds primarily serve to bring out the best argument as a group, there is an intentional emphasis on the parti-

cipants' personal sensitivities and feelings about the topic at hand. This approach is particularly good with important and complex decisions that no one can completely grasp alone, since it helps you to approach the risks and opportunities of the decision at hand proactively.

Step 5: Consent round and dealing with substantial objections

What now follows is one of the most demanding situations for the moderator in consent decision-making. They will generally modify the consent suggestion based on what has been heard so far and will try to tie in all relevant aspects. When doing this, it is important to keep the common goal in mind that provides the basis for the decision. This is even more important since things can get a bit more frenzied when it comes to modifying the draft proposal than in the previous opinion rounds. It is possible and sensible to involve the entire group when changing the draft proposal. The moderator will close by formulating a final consent suggestion in writing based on all opinions that they believe to be in line with the principles of consent.

As soon as this suggestion has been put into writing, the consent round begins. All participants are now asked individually in turn whether they agree with the framework that has been formulated, or whether they have any substantial objection to the suggestion. A decision has then been reached by consent if no one presents any substantial objections.

The right way to handle substantial objections

The key thing in this situation is to get to the bottom of the substance of the objections that have been expressed by asking solution-oriented questions. A substantial objection should only be voiced in consent if someone has a good reason for not going along with a proposal or believes that this proposal puts the organisation itself at risk. This means that every substantial objection must be justified by reasoning – this thereby prevents it from ending the entire process. The group rather keeps modifying the proposal in view until all the arguments have been considered and there are no longer any substantial objections. This is generally possible to do in a single meeting. This clear focus on good argumentation lends the consent method both speed and a solution-oriented approach.

Thank you for the objection: it can be challenging to moderate the consent round when one or several substantial objections are voiced. The first thing for the moderator to do is take a deep breath. The task is clear: on the one hand, a decision needs to be made that will take the organisation further on its journey towards its goals. On the other hand, objections need to be welcomed and valued. Anyone raising a justifiable objection is acting bravely and responsibly. Simply waving a proposal through is usually the easier thing to do. As moderator, you should therefore begin by thanking the individual for their objections.

Dealing with concerns: for every objection the moderator should ask what exactly the arguments or perspectives behind it are. They should also evaluate whether the objection really is that substantial. If, for example, it is just a 'slight objection' or a 'concern', then it is often sufficient if the one raising the objection has the chance

to raise their concerns at this point. If you also add a category for 'sight objections' to your protocol, then there will usually be nothing preventing a shared consent decision.

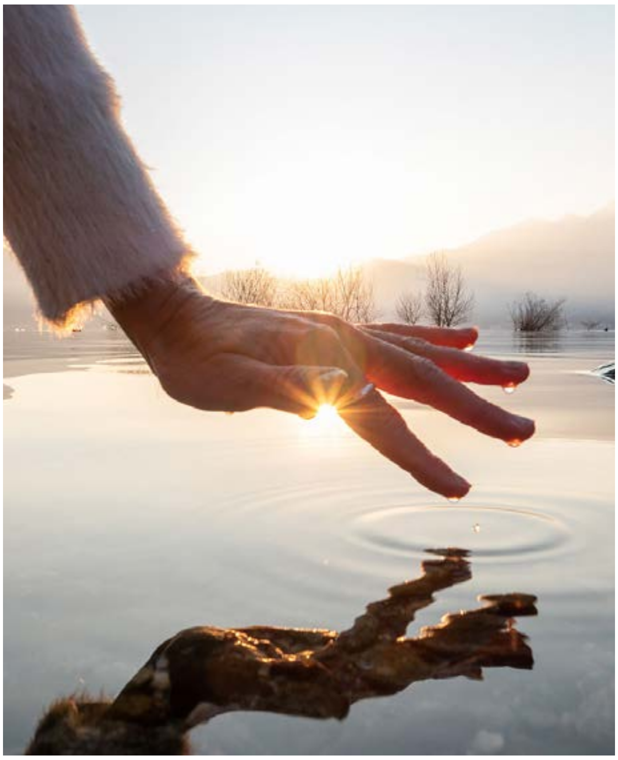
Working out a solution together: if an objection cannot easily be put to one side, then the moderator should try to work out a solution with the one raising the objection. A good first question could be: 'Do you have a suggested solution?'. This will actively involve the one raising the objection in the search for a solution. The rest of the group should also be mobilised, for example by asking everyone what ideas they could contribute to the solution.
The aim is to find a tangible solution that satisfies the justifiable, factual reservation. When doing this it is important not to drift from the task at hand, but to work concentratedly on the objection that has been raised. Once a new suggestion has been formulated that takes the objection into account, the one raising the objection should then be explicitly asked first if they consent to the new suggestion. The moderator will decide how to proceed depending on the situation. If several objections deal with similar topics, then these can potentially by looked at together. Once the group has finished working together to find a solution, all participants will again be asked whether they consent to the modified suggestion.

Helps for the moderator with substantial objections

- **Misunderstandings:** if something has been 'wrongly' understood then all the relevant information should be teased out to clear up misunderstandings.
- **Objection 'but there is an even better solution':** the moderator can point to the consent motto 'do more with good enough' and emphasise the inordinate amount of time that a 'better' solution would require. Consent is all about the next appropriate step, in other words about decisions that are as quick as possible, that are 'good enough for now' and 'safe enough to try', and that ensure the 'dynamic management' of an organisation.
- **Objection 'I'm worried about our future':** in this instance you can work with numbers, figures, or facts. You could, for example, suggest further quantifications or measurements and ask: 'is it OK if we collect new numbers, figures, or facts about your substantial objection?'
- **Limiting or shortening the period of validity:** those raising objections can usually be persuaded if a decision is categorised as temporary and is also for a clearly limited period. One suggestion could be: 'We will introduce the consent approach here and limit the test phase to half a year. After that, we will decide in consent if and how we

would like to continue with the consent approach.' If people believe that half a year is too long, you could offer a shorter test period, in this case perhaps three months instead of six.

- **Objections on behalf of others:** it often happens that people raise objections on behalf of other participants. For example, 'our decision is bad for team member A'. In this case, the moderator should address person A and ask them directly: 'when you hear this concern are you still happy to give your consent or do you have a substantial objection?' When dealing with this kind of concerned objections on behalf of third parties, it is also important to emphasise everyone's individual responsibility (see more about this in the tool 'drama triangle').
- **Dead-end decision-making:** if it is completely unclear what should happen then it is helpful to squeeze in an extra opinion round where all participants can answer the following question in turn: 'How can we now deal with this situation and find a feasible solution?'
- **Outsourcing the preparation of a solution to a working group:** if a decision becomes too emotional or seems not to be possible despite all efforts up to this point, then further preparation of a solution can be delegated to a small working group made up of the one raising the objection and one to two neutral people. This working group will be tasked with developing a solution for the next consent round.
- **Changing the decision-making process:** to avoid running into dead ends it is possible to resolve together in consent that you will change the decision-making form. This could mean, for example, commissioning a smaller team or an individual. So-called 'consultative individual decision', which is also introduced in detail in this chapter, is particularly well-suited here. With this approach, one person receives the group's mandate to decide for the group. They must observe rules as they proceed, however, that have been previously determined by the whole group. Examples of these rules: the one given the mandate must consult with an expert and a practitioner for advice or involve two further people from the group.
- **Taking breaks:** if no decision seems possible then it can help to take a short or longer break, depending on the situation. This gives the participants a chance to catch a breath themselves and to reflect on what has happened. It can also be sensible to have a follow-up meeting after 24 or 48 hours. Many things become clearer once you have slept on them, and this gives everyone the chance to bring their emotions down a notch.
- **The next highest committee decides:** if a decision is urgent or absolutely necessary, then you may reach the conclusion in consent that the next highest committee should be allowed to decide. This does not often occur, but it is also a feasible way of preventing your decision reaching a dead end.
- **Dealing with people who are notorious for raising objections:** what can you do when there are people in the team who keep raising 'substantial objections' without fail and you as the moderator or other participants get the impression that for these people it's all about preventing a decision? One possible approach is to make this behaviour itself a topic of consent decision-making. On the one hand, notorious blockers often don't like becoming a topic themselves, and on the other hand, this approach offers the group the opportunity to break down blockades factually and with the help of arguments.



Step 6: Evaluation and reflection

Regardless of whether a consent decision can be made or not, you should always end the meeting with a short round of evaluation and reflection. The following questions should make an appearance in this round: 'How are you feeling now?', 'How efficient was our meeting?', and 'How well did we work together?'. It is also important for the moderator to receive feedback. All participants also have a chance in this closing round to go round and contribute. There is no discussion, comment, or valuation.

If you introduce the consent method into your organisation, then you should make the reflection round a little more detailed. Start by focussing on the decision-making process that has just been experienced and ask: 'How did you fare with the method as participants or as moderator?', 'What changed in your feelings or opinions during the process?', and 'What would you like to be more, less, or different when we use the method again?'.

You can then concentrate on the consent method itself by asking all participants the following questions: 'In your opinion, in which situations would the method be useful?', 'What was new, helpful, or surprising for you with consent?', and 'Which alternative methods could we potentially use?'.

When you first introduce consent moderation or try out sociocracy for the first time, it is completely normal for you as a group and as a moderator to stumble at points. There will be moments of uncertainty. The consent method is particularly demanding for the moderator and even 'normal' participants will find themselves in situations with consent that they have usually not experienced in that way before. Organisations that include consent in their repertoire of decision-making tools will usually learn very quickly, however, how the procedure works best for them. It does not take long to develop a certain routine with consent.

DAY-TO-DAY SUPPORT

Resolutely introducing consent

Consent decision-making cannot be introduced with the push of a button. Not everything will run smoothly from the very beginning and there will be a learning process for all those involved. Don't let yourself be unsettled by the challenges that may come with the introduction of the consent procedure. It is important not to abandon a consent experiment too quickly, even when you are noticeably struggling with it at the start. Resolve and patience will be rewarded. Individual responsibility in your organisation will increase. There will be fewer negative or derogatory comments when passing in the corridor or in the staff kitchen if everyone's personal opinion has been listened to in consent and people realise that expressing their opinion in this way leads to positive change. Introducing the consent procedure gives every opportunity the chance for all their team members to become more like fellow entrepreneurs who think along with you and act and decide in the interests of the organisation.

Consent is not consensus

The difference between consent and consensus is very important and greater than the slight change in spelling might suggest. In a consensus decision, the search for a compromise goes on – often for a long time – until everyone can agree with the suggested compromise. Consent decision-making turns this on its head. People don't have to like a consent decision, but they can still agree with it because they have been unable to raise any substantial objections against it. Consent means that the decision is within every participant's personal tolerance zone. The range of consent decision-making is therefore greater overall than when you search for a group decision based on consensus – in other words by searching for the lowest common denominator. Consent means more room for movement and quicker decisions that will benefit the entire organisation.

More democratic than democracy

The consent procedure makes democracy more democratic. The disadvantages of democratic decisions made by the majority are sufficiently well-known and lead to the topics of democracy and participatory decision-making having such a tough time in organisations. In classic participatory democratic structures, individuals often have the impression that the majority completely overlooks them when making decisions and that individual voices count for little or nothing at all. In addition to this, a lot of time and energy is wasted as alliances must be forged to help an idea become successful. The winners in these situations are often those who are more tactically skilled or who have more resources and can therefore do a better job of lobbying.

Sociocratic consent is more democratic than democracy, primarily because it ensures that every single person can have a greater influence on a decision without allowing individuals or minorities to erect blockades. Especially younger organisations – primarily those in the IT sector – have discovered consent as their system for making decisions since many principles that stem from agile software development harmonise well with the approach in consent (cf. tool 'Scrum').

Consent and resilience

A less well-noticed positive side-effect of applying the consent procedure is the fact that it improves an organisation's risk management in a very sustainable way. If people are searching for objections with every important decision that is made, in other words the potential negative consequences of a decision are explicitly given centre stage, then the consent method will make a substantial contribution to the improvement of an entire organisation's resilience.

What should and shouldn't be decided with consent?

The consent method should be kept for important foundational decisions. This could include the following topics:

- Vision, mission, products or services and the goals, strategies or plans connected to these.
- Decisions that affect the structure of the organisation.
- The organisation of processes or important procedures in your daily business.
- Budget frameworks and budget decisions.
- Roles or functions within the organisation.
- Appointments and redundancies.

The consent procedure is generally suitable for less important or more detailed decisions, but consent usually requires a disproportionate amount of effort compared with the gain. One option here as an alternative mechanism for making decisions is 'consultative individual decision' that is also introduced in this chapter.

Once the consent method has been routinely used by all participants for making important decisions of primary significance, then you will find that the issue of 'substantial objections' or statements such as 'that is good enough for now' and 'that does not pose a problem for us as an organisation' will be expressed by more and more people, even when it comes to less important decisions. The central elements of consent will become part of an organisation's normal language and will form the basis for decisions that are less significant without explicitly needing to run through all six steps of the consent decision-making procedure.

A system for participating so that decisions can actually be made and implemented

'Too many cooks spoil the broth.' This is one of the proverbs that many people have grown up with. Perhaps it is time to move on from this one-sided perspective, or at least to modify it by saying 'Too many cooks spoil the broth, but only when it is not settled who does what and when.' In consent, everyone is 'cooking' a broth together for everyone to enjoy, and this takes place in a structured way without chaos.

Many people associate the topic of participation with endless discussions without satisfactory results, internal power struggles and the observation that previously made decisions are repeatedly being put on the agenda again by individual people or parties. The one thing that actually falls by the wayside is the consistent implementation of decisions. This is why joint decision-making, autonomy and participation are topics that a lot of leaders approach with hesitation, usually because they have stored up precisely these negative experiences mentioned above. The consent method offers a real alternative that makes it possible to achieve suitable and quick decisions both in times of financial success and in times of crisis.

Consent in times of crisis

It can be especially useful in times of crisis to use everyone's expertise. The usual reflex and the classic leadership response in moments of crisis are usually, however, to do the exact opposite. Groups start looking for the strong man or woman and, in doing so, end up putting all their eggs in one basket. It can turn out ok, and business bookshelves are full of stories that share the successes of thriving management gurus with us. By contrast, you won't find the book 'I took responsibility, and we were bankrupt within half a year' on any best-seller list, even though there would be millions of experienced authors worldwide for this. Why doesn't such a book exist? Well, no one wants to read it and the potential authors usually move straight from their failure as manager into another leadership position at another company. Whether they'll have any more success there remains to be seen.

Anyone who would like to experiment with the consent method should not be put off by a moment of crisis. There are many examples of times when a sociocratic approach came to the rescue, including in the company Endenburg Elektrotechniek that belonged to the developer of sociocracy. They made the decision there with consent that everyone would share the task of overcoming the current crisis. The entire workforce went on to set about acquiring new contracts. Within little more than half a year the crisis had been overcome and instead of 60 people having to lose their job, as had originally been planned, the workforce only had to be reduced by a very few people. This shows us that it can be wiser to count on everyone in a crisis, rather than just letting one person decide. This is especially true if the one making the decision is an independently employed leader who typically has little to lose. Even poor managers can usually quickly find a well-paid position again, but the same is not equally true of the employees who have lose their jobs.

Conflicts and consent

You should not get the impression that consent decisions always run smoothly or that a cooperative way of working together will take root in your organisation with the flick of a switch. Consent is not an anti-conflict approach. If, for example, 'war is being waged' between individual areas in your organisation, then the consent method will not automatically help you find a way forward. This is a challenge that requires a lot of effort. You will find various tools in this handbook to help you productively deal with clashes and conflicts.

The consent approach still offers a considerable advantage even in conflict situations, however. Once it has been properly set up and accepted within the organisation, you will be able to rely on the consent culture of focussing on the facts – even in times of serious conflict. The difference to dealing with conflicts without consent is that you are using a structured approach within which you can 'get down to business'.

It is important for all participants to prepare

If the consent procedure becomes a regularly reoccurring process for making decisions in your organisation, then you should prepare each meeting carefully. Send out the agenda to the participants in advance, as well as any important and relevant sources of information or facts. All participants will then be able to better prepare for the decision that has to be made. This reduces the risk of not being able to make certain consent decisions because important information is missing, meaning that the step 2 (information round) cannot be completed.

Consent does not work without transparency

Dealing openly with important information, without which you cannot make foundational decisions in consent, should be embedded in an organisation's DNA. It does not work if transparency and openness are not put into practice. If, as was the case in the Netherlands, for example, an entire workforce decides to forego a pay rise, this can only work if the company's figures are regularly made public – and not just when you are already in a crisis.

The beta-codex tool that is also introduced in this chapter is a good way for you to find out about 11 further important principles alongside transparency that will provide you with very practical help as you make decisions with consent.

Regularly practice moderation

The moderator has a very important function in consent and, where possible, should be taken on by as several different people in an organisation. This requires practice. Consent moderators must be very attentive in all phases of a consent decision if they are to be able in the decisive moment, for example when a draft proposal needs to be changed in light of a substantial objection, to formulate a suitable consent suggestion.

This also requires a strong ability to reflect for a moderator to be able to express their own opinion and personal feelings about a draft proposal without being perceived as biased. In practice, this means that all those involved will have to grow into their roles. It is particularly important that moderators can speak openly and transparently about their experiences in the reflection round (step 6).

The attitude of the moderator

The following aspects contribute towards good consent moderation:

- Showing an appreciation for all participants and their statements, as well as for yourself.
- Taking a birds-eye view: you need your procedural hat on and should know which stage the group is currently at.
- Being selfless in the role of moderator: you are serving the group and helping them to make a shared decision. You are not there to further your own interests.
- Finding a good balance between 'giving free rein' and 'reining it in'.
- A good moderator will have the courage to address things that are not necessary.
- Inwardly trusting the consent approach: if we all keep to the structure then we will reach a consent solution.
- Having patience, inner peace, presence, and empathy.
- Being open to suggestions from the group that are substantial or relevant to the process.
- A good moderator can express and withstand their own lack of knowledge or sense of being overwhelmed. They will call for the support of the group when this is the case.

The attitude of all participants

All participants should not only have an open attitude to their team members in the specific decision-making context of consent, but also in their general dealings with each other. There will be a widespread sense that the consent approach is successful and authentic when behaviour such as accepting other opinions, sharing responsibility, or regularly dialoguing as a team emerge in other aspects of daily work and become a part of normal interaction with each other.

Peer pressure in consent?

The assumption is often voiced that, especially when it comes to raising a substantial objection, peer pressure or 'groupthink' could lead to such objections not being voiced, even though they would have been very important and pertinent. This is a justifiable objection and, as moderator, you should prepare yourself for this. It works best if you have an example from your own organisation to hand where it would have been desirable if a team member had raised their substantial objection and thereby prevented a false decision.

History is full of catastrophic decisions that could have been prevented if those involved had had a little more courage.

Make clear to your team:

- Every objection could be important for the survival of your organisation. That is why no one in this round could have no interest in listening to the objections.
- On the topic of 'peer pressure': a well-functioning use of the consent approach will mean that no one will dismiss an objection. All participants know from experience how valuable an objection can be and that most objections can be integrated well.

Consent online – not a problem

We recommend introducing and practicing this approach in person to enable better reflection about interactions during the consent procedure. Once a certain routine has been established, then this approach can also be used just as well online.

RESOURCES

Buck, John; Villines, Sharon (2007): We the People: Consenting to a Deeper Democracy; Sociocracy.info Press.

Eckstein, Jutta; Buck, John (2020): Company-wide Agility with Beyond Budgeting, Open Space & Sociocracy: Survive & Thrive on Disruption; Jutta Eckstein.

Laloux, Frederic (2016): Reinventing Organizations: An Illustrated Invitation; Frederic Laloux.

Internet resources: https://www.sociocracyforall.org/

Consent decision-making can be learned and practised in a playful way. On the following German website by Christian Rüther you will find English materials: House-Sharing-Game (English Version). It is available for download free of charge here: https://www.soziokratie.org/wg-spiel/

#consent #decisions #democracy

#individual responsibility #self-organisation #participation #agility

16 Giving Getting Feedback

‘Out beyond ideas of wrongdoing,
and right-doing, there is a field.
I will meet you there.’
Rumi

Benefits

When is this method useful?

- When you want to establish clear rules of cooperation based on considering your needs and those of your team members.
- When you want to make your team members feel emotionally safe by explaining difficulties on an ongoing basis; nothing happens behind their backs.
- When you want to create an inclusive environment where everyone under stands the different perspectives of team members.
- When you want team members to communicate directly with each other, avoid manipulation, and not influence each other negatively.
- When you want yourself and team members to grow in your self-awareness, to learn from each other and to improve in everyday work situations.
- When you want to prevent conflicts from arising because there is no discussion in the team about what works and what does not work in cooperation.

From practice

Michal is the leader of the start-up. A crucial part of their business is working with investors. Michael recently hired Robert because of his success in raising funds from investors. However, Robert's first meeting with a potential investor was disappointing. During the conversation, the investor seemed to be surprised at the direction of the discussion. The businessman had 20 minutes, which Michał thought was not enough time.

The investor had initially expressed interest, but then withdrew his support from the project. Michal was embarrassed to see how Robert led the meeting. He thought that Robert was not convincing enough, and that the client had been scared off by Robert's lack of competence. The leader decided that he wanted to give this feedback to Robert because it was possible that he was not aware of the effect he had on the investor. If Robert continues to prepare meetings and hold talks in this way, he will have no results.

On the way back, Michał told Robert: 'You know Robert; you could have prepared this meeting better. Tell me, how did you feel when the investor first expressed interest and then refused to work with us? Didn't you think that it would have been worthwhile to press him more on this point? When you failed to respond, the client was scared at your lack of competence and eventually gave up on talking further with us. Before meeting with a new potential investor, I would like you to prepare a plan for the conversation, which we will then discuss together and decide on a final strategy'.

To Michal's surprise, Robert did not react as he had expected. He did not understand what Michal was trying to say to him. He had conducted the meeting in the same way he always did. He believed that there he had booked enough time and that meetings with the potential investors who turned their proposal down was just a normal part of their work. He also disliked the way that Michal expected more insistence because he did not want to be seen as aggressive when dealing with people. In response, he defended himself against the way of working that Michal wanted to impose on him. Their conversation increasingly turned into an argument. They both refused to budge from their initial positions. Robert began to wonder whether he would be able to work with Michal. Michal wondered whether he had hired the wrong person, who was not very open to feedback. Their relationship had deteriorated.

Michal had intended to influence Robert. However, he ended up provoking resistance by:

- using judgments, not facts. He spoke not about what he observed and did not observe but passed on his judgements about Robert's behaviour (you should have been 'better prepared').
- using interpretations of the client's behaviour rather than facts ('the client got scared').
- treating his idea of conducting a conversation (squeezing the client) as an objective, effective strategy with which Robert should agree, although the two parties did not have a shared standard.

This led Robert to reject the proposal for action he made to him.

How could he have given the feedback more successfully? Here is an alternative approach:

'You know, Robert, I have some observations about the meeting, and I would be happy to share my perspective. Would you like to hear it?' [creating a contract, checking if feedback is desirable]

'I noticed that the client asked us what the purpose of the meeting was and told us that he had 20 minutes for us. Initially, he said that he was interested in working together with us, but after hearing the description of the project, he said no.' [facts]

'Personally, I found this conversation quite difficult and I felt lost.' [feelings]

'...because I need more clarity and focus.' [personal needs]

'I would like to ask you to prepare an agenda before meeting with a new potential investor, which we will discuss together and decide on the final strategy before the meeting. What do you think about it?' [request for concrete action]. 'I am also interested to find out how you perceived this meeting.'

This alternative approach is free from attack and is an invitation to develop a better quality of cooperation and bring about positive change for both sides.

In a nutshell

Feedback is the foundation of teams who rely on flexible cooperation. For you as a leader, it is one of the most important tools if you are to have an appreciative and effective impact.

Feedback is a way to talk to others about things that are working or not working in your collaboration / relationship with another person. By clarifying misunderstandings on an ongoing basis, they do not escalate into conflicts. By talking about what works, you strengthen good cooperation.

Feedback is a kind of 'gift' that you can give to yourself, the other person and your relationship. It is supposed to give you more understanding, trust, and better-quality cooperation. Feedback helps express how you are without blaming and criticising. Asking for feedback yourself helps you as a leader to move away from a culture of demands. Each refusal of the interlocutor is an invitation to a dialogue to search for strategies and to find a win-win solution.

You will be able to answer the following questions with the help of a well thought out feedback process:

- What works in our cooperation?
- What does not work in our cooperation?
- What can we do to improve our work together?

It is essential to ensure that feedback is given with good intentions. Remember that an important purpose of speaking

with another person is to stay in contact and to understand them better.

Improper feedback can cause the other person to develop defensive behaviour, to attack or to withdraw. Sometimes, under the guise of feedback, the leader wants to impose his perception of reality and his ways of acting on the person without considering the diversity and needs of the conversation partner. When more complex situations arise in cooperation, some leaders feel insecure and respond by providing feedback. If you are familiar with these situations, you should remember as a leader that giving and receiving feedback is primarily intended to improve and strengthen cooperation. Feedback should not be used as an excuse to achieve another goal that has not been openly communicated.

The feedback model described below comes from the Nonviolent Communication Model (NVC), developed by Marshall Rosenberg. The basic prerequisite for non-violent communication is willingness. The aim of NVC is to shape people's relationships with each other in such a way that they willingly contribute to each other's well-being.[1]

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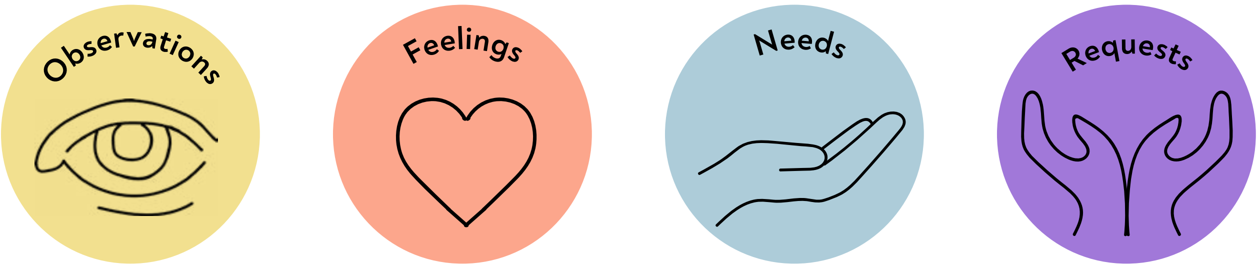
[1] 'Nonviolent Communication (NVC) is based on the principles of nonviolence, the natural state of compassion when no violence is present in the heart. NVC begins by assuming that we are all compassionate by nature and that violent strategies – whether verbal or physical – are learned behaviors taught and supported by the prevailing culture. NVC also assumes that we all share the same basic human needs, and that all actions are a strategy to meet one or more of these needs. People who practice NVC have found greater authenticity in their communication, increased understanding, deepening connection, and conflict resolution.' Resource: https://www.cnvc.org/learn-nvc/what-is-nvc

Model of providing feedback according to the 4 steps of nonviolent communication



Observations

- **Observations free of evaluations**
  - 'I see'
  - 'I hear'
  - 'I observe'
  - 'When I see ...'; 'When I hear...'

Feelings

- Emotions in relation to what you observe (rather than thoughts)
- 'I feel ...'

Needs

- What you need or value (rather than preference, or a specific action)
- '...because I need/value...'

Requests

- The concrete actions you would like taken.
- 'Would you be willing to ...?'
- Also possible asking for feedback on feedback: 'What is it like for you?'

INSTRUCTIONS

Giving or accepting feedback is not difficult if you internalise the following aspects and practise them regularly.

Giving Feedback

1. Talk about the facts

A fact is an event that an objective camera could record. Pure observations of what a person does or does not do. It only refers to what has happened. Interpretations, by contrast, speak about how this has happened - and they already contain your subjective assessment.

Positive assessments can raise the mood, but they do not lead to the repetition of positive experiences in the future because the person does not know what exactly was good. For example: 'you have prepared well for the meeting' says significantly less than 'during the meeting you summed up our cooperation so far'.

The facts contain what you can see and hear in the other person's behaviour. Evaluations, by contrast, contain interpretations, generalisations and expectations of concrete actions. Without relying on facts, a person may be confused and not know what you are referring to or why are you talking about it.

Replacing evaluations, interpretations, and judgments with facts will make it easier for the other person to open up to what you are saying. Judgments evoke a sense of injustice, resistance, defensive attitudes and can even lead to attack.

2. Talk about feelings

Feelings are an essential part of self-expression and of being an authentic leader. You have probably noticed that the same set of facts can evoke different feelings in different observers. In the example cited above, Michal felt embarrassed. Another person in the same situation might experience anger. Someone else might have felt sad. This problem might even have generated positive motivation for yet another leader.

There are no good and bad emotions, only pleasant and unpleasant ones. The former you feel when your psychological needs are satisfied – the latter when your needs are unmet. For example, you feel satisfied when achieving your goals and experience frustration when you do not have an influence on events around you. In this context, emotions always have an informational function and indicate the needs that are important to you at that moment.

If you want to be an authentic leader, it is essential that you can notice and recognise your feelings. Everyone is responsible for how they experience the reality around them and what emotions arise. It is good to refer only to yourself if you want to talk about emotions safely. For example, 'I feel annoyed' communicates your feelings without blaming or projecting your emotions on others by saying, 'You are annoying'.

It is easier to form judgments than to talk about your feelings. It is easier to say, 'you made a mess of the meeting' than to say, 'I felt embarrassed at the meeting' and describe what events caused you to feel that way. However, whereas the first way invites the other person to react by defending or attacking, the second invites a dialogue.

Similarly, by giving positive feedback and talking about feelings, you show how the other person's action affects you personally. Instead of saying: 'professional presentation', it is worth using personal language and

saying, ‘I felt confident during your presentation’. Instead of saying ‘you organised a great team-building event’, you can say, ‘I am glad that the way you organised the team-building event meant I could get to know our team members better and have a lot of fun. I felt great’.

People have very different levels of sensitivity to their emotions. Some are better than others at identifying their own feelings. However, with a little training, anyone can learn to communicate feelings in feedback sessions so that a productive exchange can take place.

3. Talk about your needs

Needs are universal human qualities that we all experience. Needs are not related to a specific place, time or person. Needs motivate your every action. All your behaviours revolve around meeting your needs.

People choose different strategies or approaches to satisfy their needs. These different approaches make us differ from each other. On the other hand, we are very similar at the level of needs. This means that regardless of the differences between you and your colleagues or clients, you can generally find common ground when it comes to your needs.

What distinguishes strategies for action from needs?

Strategies for action are pre-packaged ideas about how a person decides to satisfy their needs. Needs, on the other hand, provide information about the motives behind these strategies.

Strategies of action (1/7)

Needs (6/7)

1/7 of the iceberg protrudes above the surface of the water and 6/7 is submerged. This is not visible above the surface of the water. The same is true of strategies for action and needs. Actions are immediately visible to other people. The needs behind these actions are hidden and rarely revealed. This can lead to many misunderstandings.

For example, asking for a raise is a co-worker's strategy for action – something they express in conversation or, more formally, in writing. However, the need behind this request is invisible. The same strategy could be prompted by various needs: apprecia-tion, development, prestige, security, self-fulfilment and many others. When you talk to people, you must ask about the needs behind their actions. When giving feedback, it is essential to be straightforward about your needs without leaving room for guesswork or misinterpretation.

If you express your needs clearly, the co-operation with your colleagues can become closer and at the same time more flexible. Keep in mind that needs can be met through very different actions. There is a lot of room for achieving a good solution that satisfies everyone involved.

You can define your needs by answering the following questions:

- What is essential for me?
- What added value should the solution have for me?
- What do I want to achieve with my action?

Sometimes, it takes a bit of reflection to get to the bottom of one's own needs. As with feelings, some people are perfectly clear about why they want something, while others are not as aware of their needs. On the way to increased self-awareness, every leader should ask themselves repeatedly which needs cause them to act in certain ways.

4. Asking instead of demanding

The purpose of feedback is to strengthen cooperation. Feedback conducted only on the level of facts and personal concerns (feel-ings and needs) can leave the other person feeling helpless. To avoid this, you must not leave your feedback partners in the dark. You can do this by making a specific request. The more clearly your request is formulated, the better. It is important that your request can be fulfilled and that the result is clearly verifiable.

An example of a wrong way to formulate a request: 'I have an important speech tomorrow in front of the board, and I am very nervous. Since you will be there, could you please support me?' A better way to formulate it is: 'Tomorrow I have an important speech in front of the board, and I am very nervous. You will be there. Can you look at me and smile when I start my lecture?'

In the first example, the speaker talks about his need for support but does not express how he would like to receive it. The person to whom the request is addressed is thus excessively responsible. In the second case, the request is tangible and feasible. The speaker explains a simple strategy for receiving support.

Sometimes, it is unclear whether the other person understands what you are saying when you pass on a message. You may therefore need to ask the person to repeat what they have heard from you or to summarise your request.

If you proceed in this way and, for example, ask again in the case of possible misunderstandings, you signal that high-quality communication is important to you. This can be particularly important when strong emotions arise in a conversation, because emotions are more likely to cause a message not to reach the addressee as it was intended.

A good way to further improve the exchange between each other in a feedback session is to ask for feedback on your feedback. When giving information to another person, we often want to know how what we say affects them. This approach invites even better dialogue. You can ask the following questions:

- How does what I have said make you feel?
- What does what I have said mean to you?
- How do you feel now about what I have shared with you?

A request in terms of a non-violent communication model is not an order. When you ask, you are open to the person you are speaking with. Your interlocutor can agree or disagree. A 'no' does not mean you can no longer reach an agreement. Together you can look for a better way to meet your mutual needs.

Example wording for feedback

Proceed step by step:

Step 1 Observations

State the facts that are relevant.

Step 2 Feelings

Name the feelings that this perception triggers in you. Do not pass on the responsibility for your feelings to the person you are talking to.

Step 3 Needs

Name the need that this feeling evokes.

Step 4 Request

Ask for concrete action (or feedback).

Example 1

'Your summary sent to the law office contained all links to legal acts. Your action saved us two days of work.'

'I was happy, ...'

'... because I value efficiency at work.'

'Can we agree that this will be the standard of our cooperation with lawyers from now on?'

Example 2

'We discussed yesterday that you would prepare a list of recommended suppliers for this morning, it is noon, and I do not have it.'

'I am surprised, ...'.

'... because I need to keep my agreements.'

'When you are quoting me an end date, can you please give realistic deadlines that take your other commitments into account?'

Example 3
'You arrived 40 minutes late at the training course.'
'I was concerned and nervous, ...'.
'... because I need information.'
'Please call me earlier if you know you will be late.'

Example 4
'You led a peer counselling session for the first time today. This was the first meeting of its kind in our organisation.'
'I felt proud, and I was happy, ...'.
'... because I value cooperation and development'.
'Can you share with me what value this experience has given you?'

How to get feedback?

Asking for feedback from colleagues and stakeholders is one of the most effective development methods in the workplace.

It is good to clarify what you want to know when gathering information about yourself. This will allow you to formulate your request to get what you want most. The more specific the question, the better the chance of getting a helpful answer that you can use for yourself.

Here are some examples of questions that you can ask:

- 'Can you say which of my contributions to our project have helped you?'
- 'How did you feel about me during our work together?'
- 'What was helpful and what was difficult for you during our work together?'
- 'What do you think about our cooperation?'

By adopting an attitude of interest, you will draw valuable feedback, even if the information is given in an evaluative manner. For example, when you hear 'this solution is hopeless', instead of defending yourself or withdrawing, you can look for information hidden behind this statement by going down to the level of facts:

- What precisely in this proposal is hopeless?
- What works and what does not work in this solution?
- What have I not included in this solution?

Accepting feedback well and consciously - but also giving feedback correctly - you may not succeed perfectly th first time in practice. However, if you as a leader take your team along with you and all team members regularly develop themselves in this area, then you will have created a good basis for sustainably improving communication in your working environment. Even colleagues who often get into conflict with each other will be able to resolve their differences more productively in the future if they consciously use the simple feedback rules presented.

DAY-TO-DAY SUPPORT

First things first

Deliberately choose which information you want to convey. Do not overload a person with too many details. For example, if you identify several areas of development opportunities for the person receiving feedback, start with the most important aspect.

Positive feedback is essential

When giving feedback, don't forget to mention positive aspects. When you tell your team members how their behaviour affects you positively, it strengthens your bond, and it increases their willingness to repeat these positive actions.

Beware of generalisations

When giving feedback, avoid terms like 'always' or 'never'. These generalisations are usually wrong. A person will never 'always' be late or 'never' meet their deadlines. A generalised statement is also easy to counter. That is why you need concrete situations and clear facts when giving feedback.

Leave freedom of choice

Avoid giving advice or suggesting specific courses of action. When giving advice, you will be depriving the feedback receiver of the freedom to decide what is best for them.

Leveraging reaction to negative responses

When giving feedback, be prepared to receive a negative response. For example: 'No, I don't agree, I don't see it that way, I will not comply with your request'. Instead of insisting on your request, you should then adopt an interested attitude and ask your interlocutor for their perspective, their view, and their intentions. Your interlocutor's 'no' thus becomes the beginning of a dialogue aimed at strengthening your cooperation by considering both your own and your interlocutor's needs. The tool 'inclusive dialogue' supports you with further interesting suggestions on how you can better shape communication.

Feedback is not a job reference

It is wrong to think that someone giving feedback is assessing your work as a whole. This feedback is about frank communication on one aspect of your work that should be as clearly identifiable as possible.

Organise follow-up

Arrange an appointment for a follow-up. Many leaders believe that behaviour already changes if they simply give feedback properly. This is not always the case, however. If you arrange a follow-up appointment, you can find out what has worked and what has not.

Feedback and team contract

You can work with 'contracts' (cf. tool 'team contract') to avoid many pitfalls that can occur when working with feedback. If there is a consensual agreement in the team in advance on how feedback will be given and accepted, then everyone can refer to this agreement and take responsibility for ensuring that it is respected. The tools 'giving getting feedback' and 'team contract' can also support each other to generate a positive impact. Giving feedback correctly supports the entire team, for example, in adhering to a voluntarily agreed team contract e.g., how certain work is to be done or how communication in the team is regulated.

Some leaders assume that simply imposing rules will lead to them being followed. This is naive. 'Feedback' and 'team contract' together make it more likely that well-sounding practices and rules will actually take effect in practice. Feedback also makes it possible to readjust a team contract if it turns out that other arrangements are better suited to successful cooperation.

RESOURCES

The feedback model used in this tool is based on 'Nonviolent Communication' (NVC), a concept developed by Marshall B. Rosenberg.

What is Nonviolent Communication? https://www.cnvc.org/learn-nvc/what-is-nvc

Rosenberg, Marshall B. (2015): Nonviolent Communication. A Language of Life. Life-Changing Tools for Healthy Relationships; Puddledancer PR.

Also recommended:

Rosenberg, Marshall B. (2012): Living Nonviolent Communication. Practical Tools to Connect and Communicate Skillfully in Every Situation; Macmillan.

Miyashiro, Marie R. (2011): The Empathy Factor. Your Competitive Advantage for Personal, Team, and Business Success; PuddleDancer Press.

Web resources on Nonviolent Communication:
https://www.cnvc.org and http://www.nvcdancefloors.com.

Also worth reading, partly because it focuses on the perspective of those receiving feedback:

Stone, Douglas; Heen, Sheila (2015): Thanks for the Feedback. The Science and Art of Receiving Feedback Well; Penguin Books.

Understanding feelings and needs better:

If you want to develop an understanding of feelings, take a look at this list:
https://www.cnvc.org/training/resource/feelings-inventory

As a starting point for exploring your most important needs, this list is suitable:
https://www.cnvc.org/training/resource/needs-inventory

#giving feedback #getting feedback

#non violet communication #nvc #Rosenberg

17 Drama Triangle

'A victim confuses vulnerability with helplessness.
A persecutor confuses verbal violence with power.
A rescuer confuses rescuing with helping.'
Stephen Karpman.

Benefits

When is this method useful?

- When you recognise patterns of communication in the team that do not lead to a win-win situation. Instead, all those involved feel bad at the end. When you want to be able to respond to these patterns with appropriate interventions.
- When you want to deal constructively with conversational situations where accusations are being made.
- When you want to encourage positive team communication by actively dealing with manipulation and counteracting interpersonal games.
- When you want to encourage healthy relationships and emotional security in your team so that your team has a good foundation for their own development, performance, development of innovative ideas and enjoyment of their work.

From practice

Malik is a respected and successful employee who markets his company's technical products. To be successful in this area he must combine technical expertise with the ability to negotiate and make sales. Success in this area is not something that happens overnight. It requires a systematic approach, a strong awareness of customer needs, and the ability to be constantly learning. The company's strategy is increasingly to hire employees with little experience, who then gain their expertise on the job. Malik plays an important role in this process. He is regularly the mentor for the young employees. He always liked helping and passing on his knowledge. He even wanted to become a teacher when he was younger. He recently concluded, however, that helping others is burning him out. This realisation was triggered by a conversation that he had had with Oliver. The younger employee had asked for his advice, since he had been unable to gain any new customers for a long time. Oliver was worried that he could lose his job if things went on like this. This is how the conversation went:

Oliver: 'You know what, Malik, I'm struggling to gain new customers. It is difficult to really get in contact with the customers. They mainly work from home. I find it easier to establish and develop contacts when I meet them in person.'

Malik: 'Have you tried inviting the customers to visit us in the office? I've had good experiences of this in the past.'

Oliver: 'That works for you. You already have a business relationship with your customers, but it doesn't work for me.'

Malik: 'You could try persuading them by switching your camera on and using your positive body language to develop a relationship with the customer. We could practice that together in a video conference if you would like. I could take on the role of the customer. What do you think about that?'

Oliver: 'I don't like simulated sales conversations – they are too far removed from reality. Can't you think of anything that will grant me success more quickly?'

Malik: 'Well, (Malik is increasingly perplexed) why not ask your customers how they work with their service providers or business partners and then fit yourself in to their approach? That's how I do it.'

Oliver: 'Just ask them directly about their preferences? That's impolite. Are you serious, Malik? I thought that you would have better advice for me! If you were to join the sector today like I've done, I don't think that you would cope so well with the market.'

Malik felt really rough after this conversation. It wasn't the first time that he had wanted to help, and his conversation partner had made it clear that he hadn't made enough of an effort. At the same time, however, Malik got the impression that Oliver was fobbing off responsibility for his work to him and making him responsible for his lack of success. Malik got the impression that he was always giving more, sharing his best practical knowledge, and his mentees were simply not valuing it. He was on the brink of withdrawing from his role as a mentor.

He turned to his team leader Klara with his dilemma. Once Klara had listened to Malik's struggles, she set out the hypothesis that Malik and Oliver had fallen into a drama triangle in their communication by taking the roles of persecutor, rescuer, and victim. Oliver communicated with Malik from the position of the victim by displaying powerlessness and helplessness and fobbing off responsibility for his performance to his mentor. Malik responded in the role of the rescuer. He wanted to support Oliver, took responsibility for the situation, and tried to find ever better solutions. Meanwhile, Oliver had changed from the role of victim to that of persecutor as he heard Malik's advice and started to make Malik responsible for ideas that were impractical or unreasonable.

By the end of the conversation, both felt themselves to be powerless and 'losers'. Oliver felt this way because the talk confirmed his feeling that there was no way out of the situation. Malik felt this way because he was convinced that he had given so much of himself, only to hear complaints rather than thanks.

During the conversation with Klara, Malik learned that the drama triangle is a kind of interpersonal game that often takes place unconsciously. Rather than introducing positive changes, it simply aims at maintaining the status quo. In a subsequent conversation Malik learned how to recognise communication in the drama triangle. He understood where he tended to fall into the role of rescuer and why he attracts victim behaviour. He learned to no longer burden himself with other people's responsibilities. This allowed him to start once again to enjoy providing healthy support to others, whilst paying attention to himself and his own needs at the same time as allowing others to grow without accusing others or shifting the blame around.

In a nutshell

Healthy relationships within a team mean that ...

- every member of the team takes responsibility for their own needs, feelings, and reactions.
- no one feels responsible for the needs, emotions, and reaction of others.
- the team members know their own competences, skills, and limits, as well as those of their co-workers, and show respect and appreciation when interacting with each other.
- everyone interacts with others with the attitude 'I am OK – you are OK' (cf. tool 'Life Positions').

That is the theory. In practice, all team members will not always behave in line with these rules of communication. When it comes to interpersonal communication, so-called psychological games are often played.

What are psychological games?

Psychological games are a concept from transactional analysis, which states that communication between people will end with a particular predictable result. The games follow an unconscious pattern of communication that leads at least to uncomfortable feelings, and often even leaves a feeling of triumph on the one side and of defeat on the other. On the

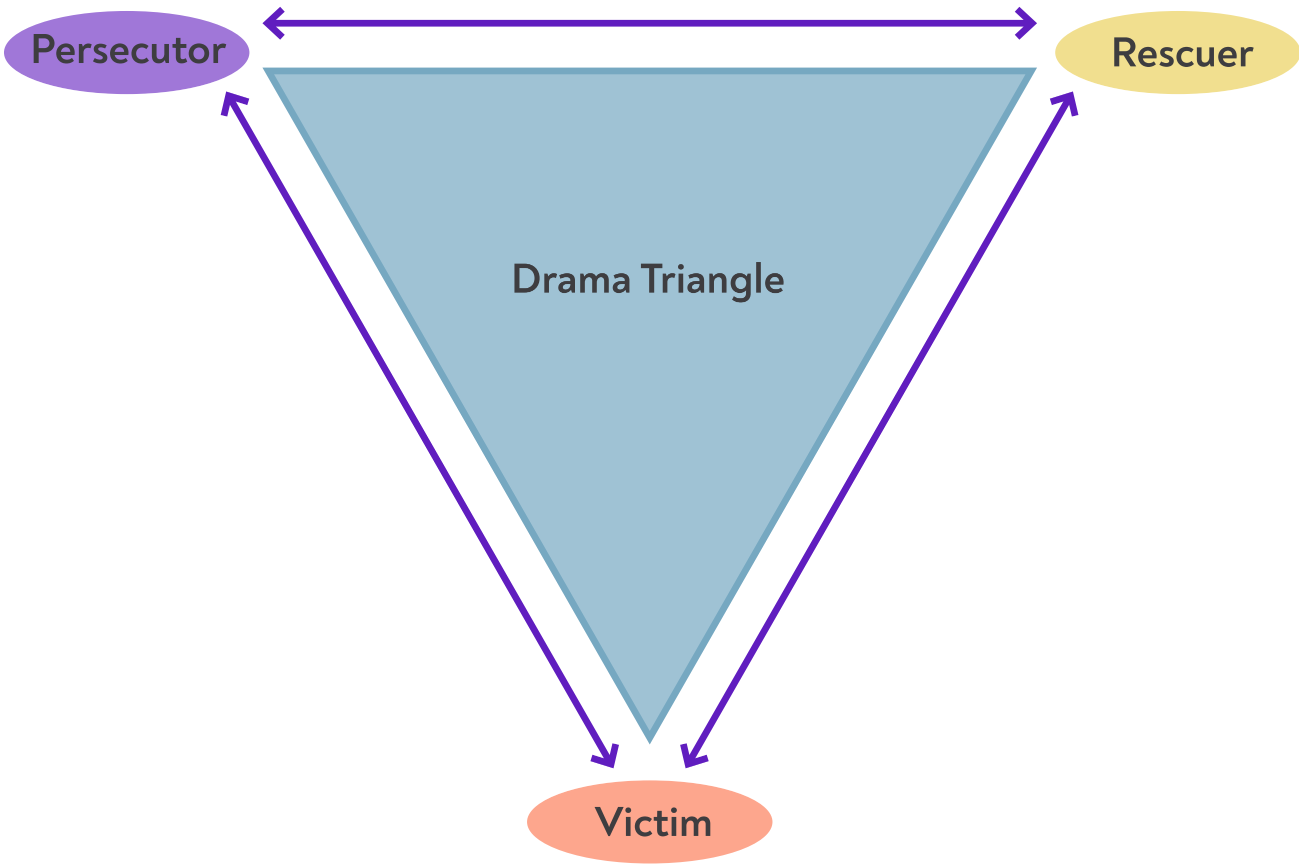
relational level, everyone involved ends up losing since games prevent nearness and autonomy.

Games are unconscious forms of communication that people use to create and repeat situations which confirm their perceptions of themselves, others, and the world - perceptions that they formed in their early childhood. Games promise a perceived advantage for those who extend the invitation to play. They receive attention, for example, albeit mostly negative attention. They avoid uncomfortable situations or prevent people having to accept responsibility.

Games prevent adult, responsible behaviour. People are not concentrating on achieving the best possible solution on the foundation of the available information. Communication seems to take place openly and without interruption. Behind this façade, however, is the hidden motivation of confirming their own prior convictions. Someone who has experienced a lack of support in their life, for example, will unconsciously conduct the conversation in such a way that they conclude at the end: 'I knew that I couldn't rely on anyone.'

One of the most fundamental dynamics of psychological games is described by Stephen Karpman as the drama triangle. Regardless of the topic of conversation, the parties occupy three roles: persecutor, rescuer, and victim.

The Drama Triangle



INSTRUCTIONS

Roles in the Drama Triangle: Persecutor – Victim - Rescuer

People unconsciously occupy the role of persecutor, rescuer, or victim. They usually enter the game in their favourite role and change to another role during the interaction. The price that the 'fellow players' pay is, amongst other things, a growing sense of exhaustion. At the end, none of those involved is left with a positive feeling.

Here is one example: a rescuer who is dissatisfied with the victim's failure to show thankfulness can become a persecutor. A victim can also take on the role of persecutor towards the rescuer by painstakingly charging the rescuer with not making enough of an enough to improve the situation.

You can find examples of the characteristics of the three roles below.

Persecutor

Beliefs

- You are better than others and have the situation under control.
- Your ways of working are the best.
- You are not confident that others could have as much influence as you, be just as proficient as you, or meet goals with any other means than are at your disposal.
- You fear that the 'world' will fall apart if you relinquish control and micromanagement.
- You feel a strong need to change other people.

Actions

- You put others down.
- You attack, criticise, reprimand, rebuke, humiliate, and embarrass others.
- You overcome difficulties by brushing off responsibility from yourself and passing on the blame to others.
- When you get the feeling that you have been treated unfairly, you want to come out on top or get revenge.
- You demonstrate with your behaviour that you feel more intelligent, better, superior etc.

Personal Disadvantages

- You take responsibility for everything (no one else could do it better).
- You experience superiority, but in the end all that remains is an unpleasant feeling.
- You often feel isolated and not understood.
- People around you fall into the victim role

Example Statements

- 'And why haven't you…?'
- 'Have you ever thought of…?'
- 'Stop thinking about this nonsense and do something worthwhile!'
- 'That idea can only have come from a really stupid person.'
- 'I'm not surprised! If I don't take charge of it, then no one will get it done!'
- 'I am surprised that someone who is so intelligent doesn't under-stand…'
- 'It is your fault that…'

Rescuer	**Beliefs** • You are convinced that others are weaker. • You have a low estimation of other people's abilities to solve problems on their own. • You don't trust others to take responsibility. • You have a hidden sense of superiority: 'I am better at dealing with problems', 'I am better at…'. • You have the feeling that you are indispensable.
	Actions • You take on other people's tasks and responsibility and solve problems for other people. • You offer to help and take the initiative without having to be asked. • You anticipate difficulties and 'come to the rescue' – even when others don't see any problems. • You make sure that other people don't need to bear the consequences or negative effects of their actions and decisions. • You take responsibility in difficult situations and take the blame yourself – even from others. • You give more than you get.
	Personal Disadvantages • Instead of the thankfulness you expected, you are often met with rejection and disapproval. • You stunt the growth of others and make people dependent on you. • You rob others of their independence. • You get more involved than you had initially planned, get lost in a task, and end up being angry at yourself and at those that you are helping.
	Example Statements • 'What Anna meant to say was…' • 'I'm sure you what you mean is…' • 'I can do that. You already have enough to do.' • 'Let me do that. You can do … instead.' • 'Let me explain it to you one more time.' • 'I can take care of that – why not treat yourself to a break?' • 'Just leave it as it is.'

Victim

Beliefs

- You are convinced that it is better for others to decide what to do, but certainly not you.
- You think that you have no influence on a situation.
- You place no trust in your own skills.
- You feel that other people influence your feelings and behaviour.
- You find life and work to be exhausting and complicated.

Actions

- You act reactively and submit yourself to your circumstances.
- You don't face up to reality and avoid potentially difficult and uncomfortable situations.
- You hand over opportunities to have an influence on others. You hand over your responsibility.
- When you raise objections, you do it in a passive-aggressive way. When you don't agree with something, you don't articulate your objection directly, but end up simply not keeping your agreements, for example.
- You complain but never actively try to change the situation.
- You refuse to accept responsibility and acknowledge the blame.

Personal Disadvantages

- You rob yourself of the ability to act independently.
- You hand over any influence on shaping reality to your colleagues or to your circumstances.
- You stunt your personal growth and the development of the team.
- You attract rescuer and persecutors.

Example Statements

- 'I don't know what the solution is. You tell me.'
- 'It's better if you do it to be on the safe side.'
- 'No one told me that.'
- 'We will fail if we…'
- 'How should I know that…'
- 'There is a better choice than to pick me.'
- 'I'll just take whichever task is left over.'
- 'I don't have an opinion about that.'

Do you know your preferred role?

In daily working life, everyone can unconsciously send out an invitation to play in the drama triangle and slip into the role of the victim, rescuer, or persecutor. To change our behaviour, we must find out which role we tend towards. Whilst it is possible to change your role and, for example, to move from rescuer to victim or persecutor, people generally have a preferred role that they have when they enter the drama triangle.

Maybe you were already able to recognise yourself in the role descriptions and could picture situations, in which you behaved in accordance with one of these roles. If you are not sure which role you tend towards, keep an eye on your inner dialogue, the way that you talk to yourself in your thoughts.

1. Think about a difficult situation that is important to you and that you are currently experiencing or have experienced with other people. In should be a situation that gives or has given you an unpleasant feeling.
2. Note down your answers to the following questions:
   - How did the situation go?
   - Why do you think the situation went this way?
   - Which feelings did the situation trigger in you?
   - What did you do? How did you behave in this situation?
3. Read your notes from the perspective of an external observer and compare the description of the three roles with your observations. Which of the roles fits the behaviour that you have depicted in your notes best? What further roles can you recognise?

Our reaction to others

If you would like to go further in this process, get to know yourself better, and shape your communication more consciously, then you should take the time to consciously observe your thoughts and reactions to current events.

Pay attention to the way that your colleagues behave towards you and which game invitations you receive. Are there roles that you respond to in a neutral or constructive way? Or roles that provoke you in a certain way and lead you to jump into a victim-persecutor-rescuer-game?

- Which roles trigger you?
- How do you respond to colleagues who play the role of
  - Victim?
  - Persecutor?
  - Rescuer?

Even if you already have an idea or an initial assumption of how you would answer this, take the plunge, and observe your behaviour over a set period of time.

It is possible to step out

Step out. When colleagues approach you in the role of persecutor, rescuer, or victim, it is important that you ...

- don't likewise choose a role and step into the drama triangle.
- can carry out an intervention that prepares the way for you to conduct a conversation with healthy communication, as described under the point 'in a nutshell' above.

If you stop helping to form the drama triangle and communicate instead in a healthy way, then this will little by little have a positive influence on the approach and, as a result, the communication of your conversation partners.

If you identify a 'drama' and can identify your role in the drama triangle and the roles of others, then you should work on stepping out of this unhealthy relationship:

- take responsibility for your feelings, thinking, and actions, and pay attention to yourself.
- let colleagues take responsibility for their own feelings, thinking, and actions, and value them.
- make sure that your boundaries are not crossed and do not cross the boundaries of those you are talking to.
- meet each other at eye level and trust both your ability to come up with solutions, as well as that of your partner.
- speak out openly and transparently about concerns or possible consequences, and work together on finding a solution.

Practical ways out of the drama

Below you will find some interventions that you can use when in contact with people who are playing the role of victim, rescuer, or persecutor.

People who are playing the role of victim

Personen in der Opferrolle zeigen sich People in the victim role present themselves to others as weak and helpless. They downplay themselves and their ability to think, act, and to accept responsibility. These people need to learn to recognise their own influence on the way events develop and to solve problems. Encourage these people to recognise their own skills, to ask for help if needs be, and to accept responsibility for their own actions.

Help people in the victim role to make the following decision against the drama: 'I will strive after what I want rather than belittling myself.'

Here are some examples of how you could respond:

- 'I have some ideas. I know that we are different, and that a solution which works well for me might not necessarily by a good solution for you. I don't want to dictate any solutions, but simply to help you find your own way. What do you say to that?'
- 'I've heard that you are not making any progress with a problem and can't see any way to act. Let's do a brainstorming session together.'
- 'I've noticed that you are anticipating high risks and that this is holding you back from acting. Let's compile the risks you're anticipating together. We can then estimate the extent and the likelihood of them occurring and discuss possible ways of dealing with them. What do you think?'
- If you conversation partner often tells you that their tasks are too much for their skills, mention past experiences and ask about the ways they could act in the past. For example, 'You achieved good results in project X. How did you go about it back then? Which of your skills did you use back then?'

People who are playing the role of persecutor

People in the role of persecutor appear to be dominant and often cause others to move into a defensive position. They feel superior, disparage others, and know exactly what is right and wrong. These people need to free themselves from the approach of wanting to manage situations. Encourage this individual to meet others at eye level, to not have to be better than others, and to accept their inadequacies that worry them.

Help people in the persecutor role to make the following decision against the drama: 'I would rather look at myself and my share than at that of my counterpart.'

Here are some examples of how you could respond:

- Show appreciation for situations where your colleague who tends to adopt the persecutor role does not force their solution onto others, but instead is open for their colleague's ideas.
- Set boundaries if a persecutor is acting offensively in the team. React when colleagues are put down. Remind them of your rules for communicating and behaving. Should your team not have any rules, then you can develop these together (cf. tool 'Team Contract').
- If the behaviour is having a negative effect on the team dynamic and on the productivity of individuals, then confront the person in a bilateral conversation with your observation that they are frequently adopting the role of the persecutor in the team. Offer them your help (cf. tool 'Leader as a Coach'). Initiate a process of change with the following questions, for example:
    - 'What does it mean for you to feel better than your colleagues?'
    - 'What could an alternative way of behaving look like?'
    - 'What would this way of behaving mean for you?'

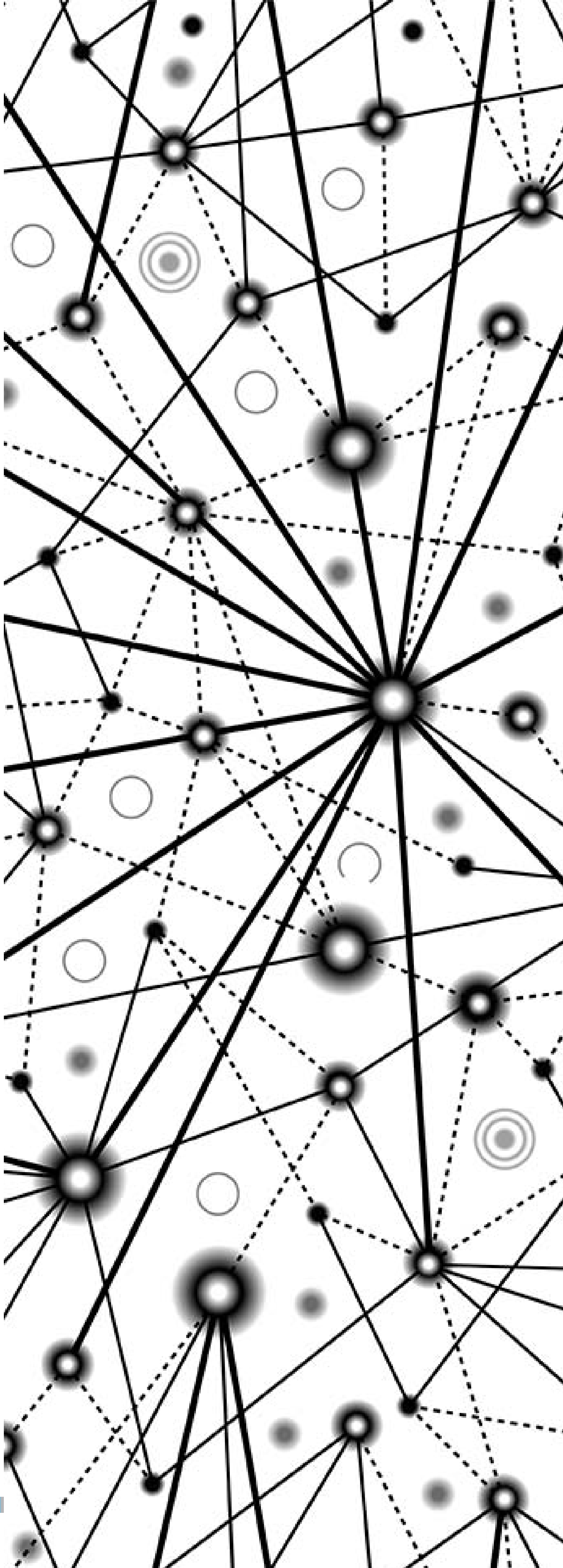
People who are playing the role of rescuer

An individual in the rescuer role is perceived to be helpful. They look for situations where others are struggling and offer to solve problems. In doing so, however, they denigrate their counterpart's ability to act, think, and accept responsibility. These people need to learn to leave the responsibility for an event or situation with the people concerned. Encourage your colleague in the rescuer role to notice the skills of their other colleagues and to trust their ability to solve problems.

Help people in the persecutor role to make the following decision against the drama: 'I will stick with my own responsibilities, rather than taking on the responsibilities of others.’

Here are some examples of how you could respond:

- If a rescuer tells you about colleagues and their struggles, you can respond in this way: ‘I think I understand the situation …
    - What is the challenge for you personally with all this?’
    - How does the situation impact you?’
    - What is your connection to the incident?’
- Be clear about your expectations: What do you want? What do you not want! Point out your boundaries and turn down an offer of help if it ‘doesn’t feel right’.
- If you know that someone tends to give you unwanted advice:
    - Inform them clearly about your needs and expectations.
    - For example: ‘I find myself in a difficult situation. Could you listen to me without giving me advice? I know that I can deal with the situation, but right now I just need to collect myself and formulate my thoughts.’



DAY-TO-DAY SUPPORT

When communicating with colleagues and in your team, don't just pay attention to what is said. Think also about whether you can identify any frequently occurring conversational patterns.

Avoid quick, familiar reactions to keep you from entering the drama triangle. For example, if a colleague comes in the victim role with a list of reasons that are preventing them from dealing with a challenge, don't respond with a lack of understanding but take a pause. Ask them about ways that they could act within the limitations that they have told you about.

Don't define your colleagues in terms of the drama triangle roles and make sure that your team members don't do this either. Avoid your colleagues characterising each other as victims, rescuers, or persecutors. This would simply lead to the stigmatisation of individuals. Remember that demeaning people will damage their connections to each other and make it impossible for you to enact change in their behaviour.

You will enact changes in behaviour by not getting involved in the invitation to play games and by responding instead with respect in the ways outlined above. People tend to copy the behaviour of their leaders. If they notice that your methods of intervention are successful, then they will start integrating these in their own communication over time, whether consciously or unconsciously.

If you repeatedly observe negative behaviour that is affecting the whole team, then you should counteract it. For example, if a group of co-workers are frequently adopting the role of rescuer and another group the role of victim, then you should create an agreement together (cf. tool 'Team Contract'). Agree, for example, that all team members will accept complete responsibility for finding solutions, or that they will only help team members if they specifically ask for support.

If team members repeatedly feel incompetent and are often anxious about new tasks, then you can place a particular emphasis on the following questions when looking at lessons learnt from completed projects: "What have we learned?", "What can we now master better than before?", "In which areas have we grown stronger?". By doing this, you will contribute to the team members developing an alternative way of behaving than the victim role.

Use the tools 'Giving getting Feedback' and 'Leader as a Coach' that are also introduced in this chapter. These tools will help you to accompany your colleagues in their development.

RESOURCES

The drama triangle model was developed by the psychologist Stephan Karpman and is part of transactional analysis.

Recommended reading:

West, Chris (2020): The Karpman Drama Triangle Explained: A guide for Coaches, Managers, Trainers, Therapists – and Everybody Else; CWTK Publications.

Karpman, Stephen B. (2014): A Game Free Life. The definitive book on the Drama Triangle and Compassion Triangle by the originator and author. The new transactional analysis of intimacy, openness, and happiness; Drama Triangle Publications.

Weinhold, Barry K.; Weinhold, Janae B. (2014): How to Break Free of the Drama Triangle and Victim Consciousness; CreateSpace Independent Publishing Platform.

Also worth reading:

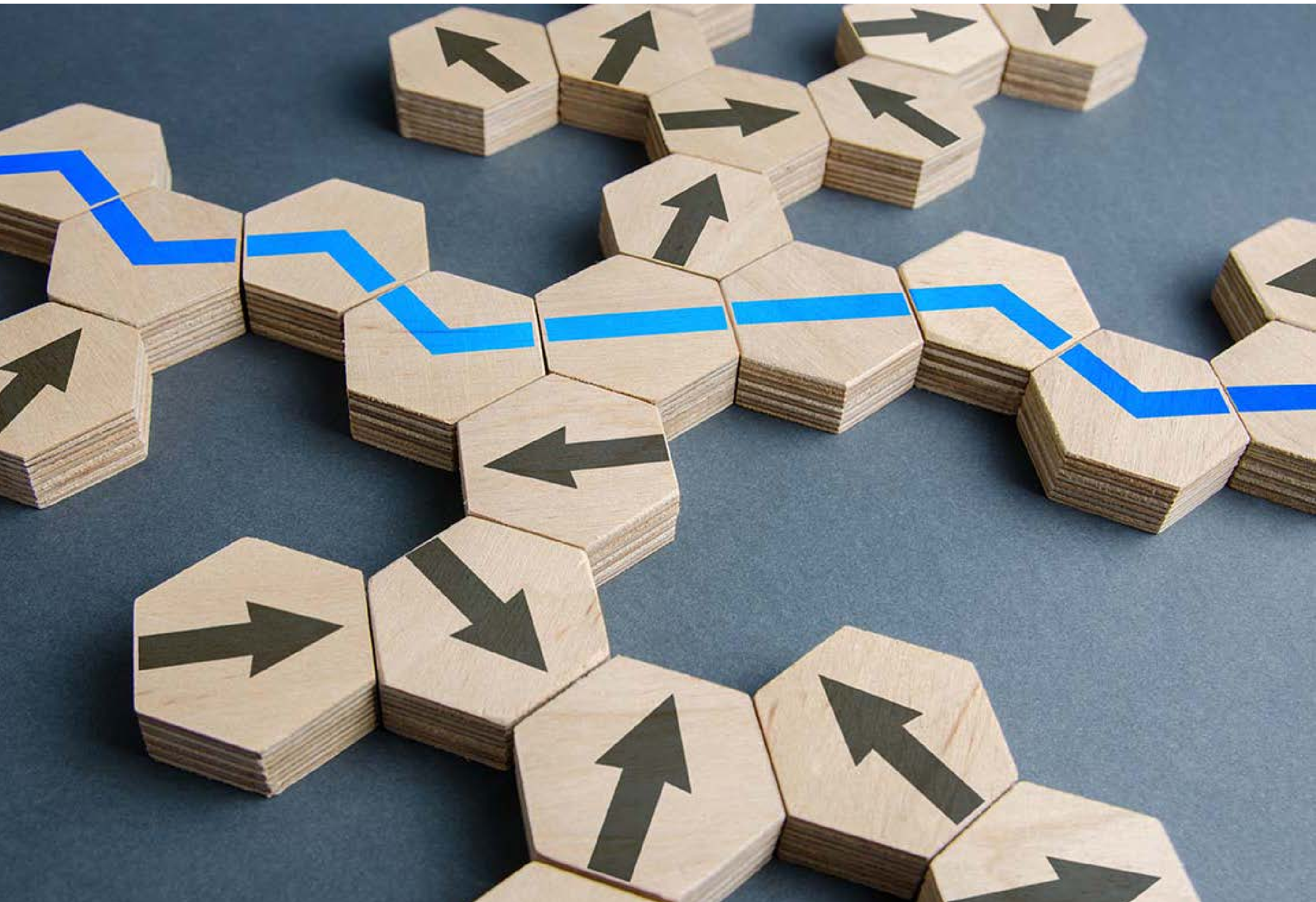
Berne, Eric (2016): Games People Play: The Psychology of Human Relationships; Penguin Life.

Emerald, David (2015): The Power of TED* (*The Empowerment Dynamic); Polaris Publishing.

#drama triangle #persecutor #rescuer #victim

18 Consultative Individual Decision

'Whenever you see a successful business,
someone once made a courageous decision.'
Peter Drucker



Benefits

When is this method useful?

- → When you want clear and efficient decision-making, where a binding decision can be made by one person.
- → When you want to avoid tedious negotiations and decisions that are inappropriate or led purely by individual interest.
- → When you want to enable a high quality of decision-making by incorporating relevant contributions from third parties into the decision.
- → When you want to incorporate people primarily based on their expertise, and it is not important where they stand in the organisation's hierarchy.
- → When you want a greater acceptance of the decision that has been made because a broad spectrum of opinions and individuals from within the organisation and externally have been consulted.
- → When you want a decision to be handled by someone who is intrinsically motivated to make an objectively well-founded decision. This is usually the case when the person making the decision is personally affected by the consequences of their decision.
- → When you want a decision-making process that is well-suited to small and large groups.
- → When you want to spread responsibility in your organisation across various shoulders.
- → When you want to enable the inspiring and self-fertilising exchange of ideas. This is an important prerequisite for generating innovative and creative new solutions that may even be disruptive.

From practice

In a medium-sized enterprise with 60 employees, the team members of a production facility expect the CEO Noah to decide on a new control software as soon as possible. The software they have used until now is no longer being developed further by the provider and it is foreseeable that there will soon be challenges in the production as important new functions can no longer be integrated into the software.

Elias, the production facility's team leader, has already spoken with Noah on several occasions and made clear which problems the company could face if they do not implement a new solution soon. Elias believes that there are four possible alternative pieces of software to choose from. Elias prefers two of these four alternatives. Because there are strongly opposing opinions in his team, however, he does not dare to express a definitive recommendation. He has also grown used to the CEO making the final decisions. In his 20 years of working at the company, he has already experienced his own ideas or preferences being overruled without further explanation on several occasions. Because he needs to know what the next step is, he puts more pressure on Noah every time they speak so that he will finally come to a decision.

Noah has kept putting this task off until now. He is a trained business economist and has little experience in IT. The previous CEO, from whom Noah took over the business almost two years ago, was more technically versed, which meant that all important technical decisions were traditionally settled by the management team. Noah is also unsettled by the fact that Elias has not proposed a clear solution. Noah knows that he is not the right one to make the decision. At the same time, however, everyone is expecting him to determine how things

should proceed. Important decisions have traditionally been the responsibility of the boss in this company – something which is not difficult for him when it comes to the economic side of the business since that is his area of expertise.

Thankfully, Noah still regularly meets up with former fellow students. Amongst other things, they tell each other about their current experiences and challenges in their jobs. One previous fellow student, who is now also employed in a leadership position, recommends that Noah make the decision with the help of so-called consultative individual decision-making. He also got to know about this method for the first time in his new business. The main advantages are that the individual tasked with the decision is well informed about the material and is also directly affected by the consequences of the decision. Consultative individual decision-making still gives the leader responsible enough opportunities to exercise influence, however.

It seems to Noah that consultative individual decision-making really is perfect for this situation. Straight away in the following week he spends time learning about this method in detail and conducts a meeting at the end of the week with Elias and his team. Noah introduces the method and asks all team members if someone in the group who would later be working with the new software would be prepared to make a binding decision on everyone else's behalf. Maxime thinks about it briefly and says that he would be prepared to do this. There are no other volunteers. Since Maxime has been part of the team for several years and is technically very well respected, no one has any objections to handing over the task to Maxime.

Maxime is given some important conditions to bear in mind during this task of choosing suitable software. He should ask everyone in the team individually what the new software must be able to do from their perspective. He must also involve Noah to find out what is important from the management's perspective. Two further colleagues in the team then each give him the names of an external contact. These two contacts are well informed when it comes to the software that they are purchasing. They are an IT expert from an allied company in Portugal and an IT expert from a national trade association that regularly deals with the question of suitable software solutions for their sector, amongst other things. Everyone present agrees that it is important to consult both external experts.

Maxime is given the mandate to make a binding decision. After a month he presents his conclusion and explains what led him to this decision. The software is purchased. Noah is very happy with the result. He gets positive feedback from the production team about the achieved results and didn't have to come to a decision himself that he was not sufficiently qualified for. Interestingly, two members of the team who would have preferred another piece of software say that are able to live happily with this result, primarily because their most important demands that they expressed in their conversations with Maxime are also achieved by the software that has been implemented. Following this initial positive experience, Noah wants to establish consultative individual decision-making in the future as one of the central mechanisms for making decisions in his company.

In a nutshell

Consultative individual decision-making is a suitable method for making decisions in organisations that want to decide participatorily, effectively, and quickly. The method connects the expertise and ability of the individual with the know-how of the group. One person is responsible for deciding, but they are required to involve other people from the organisation and, where necessary, external experts. The objections, questions, suggestions, pointers, ideas etc., of the people involved must be listened to and considered.

Consultative individual decision-making has many advantages when compared with traditional ways of making decisions. Responsibility for the decision is handed over to an individual from the group with their agreement. This is someone who has a significant interest in the decision and would also be strongly affected by or would benefit from its consequences. The person making the decision is given key conditions for their next steps and those affected by the decision can be sure that their opinion will be listened to. This leads to increased acceptance for the binding decision that will come later. A consultative individual decision also prevents the decision-maker being blinded by their expertise, since various people must be involved in the process. The diversity of the positions involved, and their ideas lead to better solutions. With this method, responsibility for important and for daily decisions can be constantly changing within an organisation. The group is always commissioning different people who are best suited based on their expertise. In the best case, this means that everyone regularly assumes responsibility for decisions. This is efficient and effective self-organisation par excellence.

Six steps to consultative individual decisions

Step 1: Analysing and formulating the decision

Step 2: Choosing and commissioning a decision-maker

Step 3: Naming the conditions and suggesting advisors

Step 4: The decision-making process

Step 5: Announcing the decision and organising its implementation

Step 6: Reflection and collective learning

INSTRUCTIONS

You can implement the consultative individual decision one step at a time in accordance with the following instructions.

Step 1: Analysing and formulating the decision

The decision must first be recognised and clearly named. This can be done by an individual or also as the result of a group meeting. The following points are important when analysing the decision-making situation:

- Who will be directly affected by this decision? Individuals, roles, team(s), or the entire organisation?
- What exactly should be decided?
- Who should decide? Which specific people, those in suitable roles, come into question given their knowledge, ability, and the way they would be affected? Create a list with several candidates.
- Which people inside and perhaps outside the organisation should be consulted? Which experts, customers, partners, suppliers, etc.?

Step 2: Choosing and commissioning a decision-maker

What makes a good decision-maker?

- Desire to assume responsibility
- Willingness to implement the decision themselves if necessary and to deal with the consequences
- Equipped with the appropriate resources for the decision
- Trustworthiness
- Specialist skills
- Proximity to the problem

Step 3: Naming the conditions and suggesting advisors

If a decision is important, then you can increase its later acceptance by taking time together with those who will be most affected by the decision to designate certain conditions and think about who should be consulted in the decision-making process. On the one hand, it is important not to put too large obstacles in the path of the decision-maker. On the other hand, you should give a voice to the interested parties who are trustingly putting themselves in the hands of the decision-maker.

Which people should be consulted? You should take the following points into account:

- How many internal and, if necessary, external experts should be consulted?
- Are a range of perspectives being considered?
- Are the people involved competent?
- How close are the people to the problem?
- Are the interests of those affected being sufficiently included?

Step 4: The decision-making process

A decision-maker will usually work through the following steps:

- Familiarisation or further consideration of the topic
- Consultation(s)
- Creation and comparison of different possible solutions
- Choice of solution

Despite the conditions discussed in step 3 and the people it is recommended that they consult, the decision-maker is free to choose how to proceed and who to consult. They can ask other people instead or in addition as they see fit. The decision-maker will try to understand all pertinent needs, ideas, information, opinions, interests etc. as much as possible and to involve them in their chosen decision.

It is important to remember that the decision-maker is tasked with making a decision based on the information available that is best from their perspective regarding the organisation's goals. The task is not to completely integrate all opinions that have been heard or meeting all interests or needs.

Step 5: Announcing the decision and organising its implementation

Once the decision has been made, the decision-maker is tasked with introducing it. This includes referencing the alternatives that were rejected. It must be transparent who was consulted and why this decision was made. Depending on the applicability of the decision, the circle of those informed will be larger or smaller. It is important that everyone involved in steps 1 to 3 proactively hears about the result.

Once made, the decision is binding and cannot be challenged. To ensure a quick application, you should immediately start thinking about implementation. So, what are the next steps for turning this decision into reality?

Please bear in mind: a non-decision is also possible. In this case, it means that the person responsible decides to stick with the status quo. This can be a sensible approach, especially if implementing the decision would not achieve a significant improvement in the overall situation – in other words the effort would not be commensurate with the outcome. In warranted exceptions, the decision-maker can ask for their decision to be formally confirmed by everyone involved or by the team. Consent decision-making, which is also described in detail in this chapter, is ideal for this. This will rarely happen and is reserved for situations where the decision-maker discovered in the decision-making process that they could not understand or assess the negative consequences, amongst other things, that their decision might entail to the extent that they thought necessary to ward off danger from the organisation.

Step 6: Reflection and collective learning

For INCLUDE leaders, a phase of reflection or collective learning should be an obligatory part of every key decision-making process. You can distinguish between three levels of reflection when it comes to consultative individual decisions.

1. Factual level: was this a good decision?

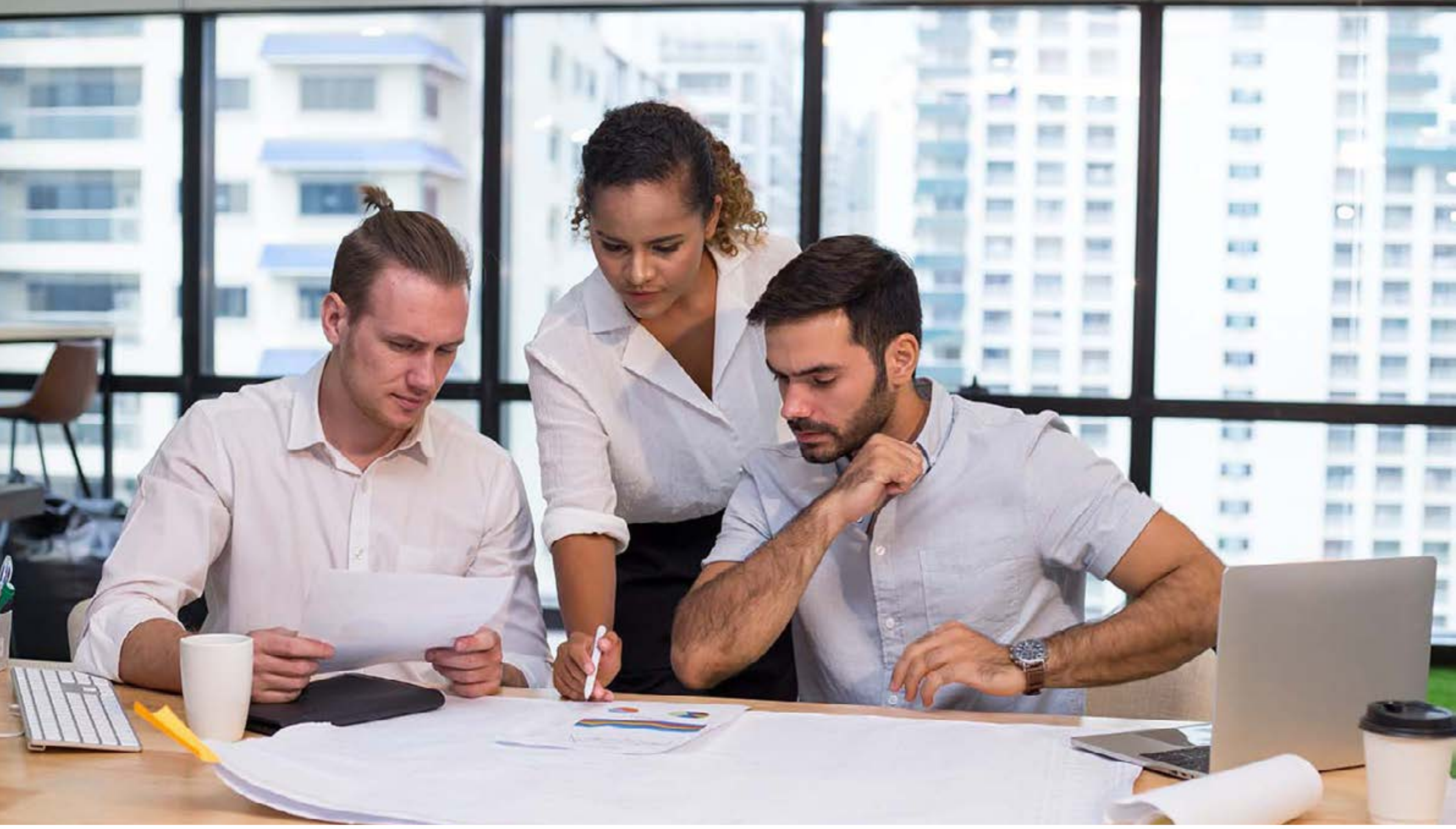
Depending on the extent of the decision, you should schedule an appointment for factual reflection at a later point. This should already be done at the start of the process. This allows everyone to discuss the lessons learned from its implementation together and to draw conclusions from them for future decision-making situations.

2. Procedural level: was the decision well prepared and well made?

This is all about analysing the amount of criticism or discontentment with the decision that has been made and perhaps accepting together that, despite these objections, the decision was made professionally and in accordance with the organisation's goals. If it becomes clear during the reflection that the decision-maker should have acted differently at one or two points, then this is an opportunity for the entire group and for the decision-maker to learn to take these points into account next time.

3. Emotional level: how do we feel about this decision?

You are not aiming for perfection with a consultative individual decision. Not everyone must and should feel comfortable with a decision. Not all wishes can be fulfilled. It is an important condition that people can 'forgive' each other. This enables organisation or teams with a limited capacity for decision-making to deal appropriately with the individual who has assumed responsibility on behalf of everyone else with the consultative individual decision. The more this particular form of a practised culture of mistakes is grasped by everyone involved, the more people will agree to assume responsibility for a consultative individual decision.



DAY-TO-DAY SUPPORT

What should be decided with a consultative individual decision?

Most decisions are not so complex or so important for an organisation that they should be decided by everyone together. However, if you are dealing with decisions of overriding importance that could have consequences for the entire organisation or team, then you can think about using the consent procedure (see tool in this chapter) as an alternative.

Decision-making situations within the systemically relevant level can usually be solved well with a consultative individual decision. To keep effort and outcome in a sensible balance here, it is important to define what will be decided by consultative individual decision-making and what can be left as an individual's task as part of their normal activities. This will depend on the importance or on the situation. The decision of which suppliers to order copier paper from is obviously not a task for consultative individual decision-making. The individuals in charge of this area can keep doing this on their own.

Determining the decision-maker

There are various options for determining a decision-maker. It is important that it is clear to everyone involved which procedures will be followed in specific instances. If there is a list with different candidates on, then people can vote about it; if someone volunteers, then the task can be handed over to them if no one disagrees; etc. When choosing the decision-maker, you can respond flexibly to the situation. You should, however, bear the requirements for a good decision-maker in mind (see step 2 above).

Consultative individual decisions and consent decision-making support each other

Not every decision-making process will run smoothly. Even with well-functioning methods, barriers to decision-making are possible. You can overcome these barriers by changing the way that you make decisions. If a consultative individual decision is proving to be too challenging for the decision-maker, then you can ask – as described above – for the decision to be reviewed with consent (see tool in this chapter) for any substantial objections.

The reverse is also true. If you reach your limits with the consent procedure, then it is possible to delegate the decision to an individual instead. This is particularly important in cases where the decision must be made (quickly), in other words doing nothing or maintaining the status quo are not viable options.

Accompanying and supporting the decision-making process online

Decision-makers do not have to restrict themselves only to conversations when forming their opinion. Depending on the situation, online tools could be useful for this phase, for example to obtain a general opinion poll with an internal survey or to collect ideas from people that they could not interview personally by posting a question in the company's chat (see tool 'remote work').

Better learning, understanding, thinking, and acting

A consultative individual decision is an INCLUDE tool that results in numerous advantages compared to hierarchical decisions. In hierarchical systems, supervisors decide based on the information given to them. This information could be prepared in such a way that it does not contain all the necessary facts or cater to the whole spectrum of interests. For the leaders in charge,

this situation represents a kind of brain teaser that they must solve at their desk based on the available information. Usually, the leader will not notice the actions and implications of their decision. By contrast, consultative individual decisions are completely different: learning, understanding, thinking, and acting are as close together as possible.

Bear in mind: even in many hierarchically structured organisations consultative individual decision-making is put into practice – albeit without the method being explicitly called this. Although this does not take place in the structured form outlined above, many leaders in classically organised systems still procure the opinion of those who will be affected by their decision or contact those they trust in their network whom they believe have expertise in a specific situation – all in addition to written information that has been prepared for them. There is not a long way between this and consultative individual decisions in the form introduced here, where it is not simply leaders who decide.

RESOURCES

The concept originally goes back to the German management consultant Niels Pfläging, who developed the core elements of decision-making processes at Toyota, W. L. Gore and dm-drogerie markt respectively into his version of the consultative individual decision.

Anonym (2019): Good Decisions Between Consensus and Consent: https://fuehrung-erfahren.de/en/2019/03/good-decisions-between-consensus-and-consent/

Roock, Stefan (2014): How we decide at it-agile: https://stefanroock.wordpress.com/2014/02/13/how-we-decide-at-it-agile/

#decision #self-organisation

#individual responsibility #participation #agility #consent

19 Leader as a Coach

'Someone who says 'a' doesn't have to say 'b'.
They could also recognise that 'a' was wrong.'
Bertolt Brecht

Benefits

When is 'leader as a coach' especially useful?

- → When you want your team members to use their full potential.
- → When you want to create space for bottom-up initiatives and thus enable creativity and innovation.
- → When you want to support your team members to become more responsible, independent, and successful.
- → When you want to support your team during changes and important moments such as taking on more responsibility, returning to work after parental leave or a change of role.
- → When you want to create a working environment where team members can act according to their values and are respected in their uniqueness.
- → When you want to develop a team that works from inner motivation instead of using carrots and sticks.

From practice

Sarah is the new leader of the marketing and publicity department in a national NGO involved in environmental work. She leads a team of six colleagues that has been underperforming for the last three years: the number of members has dramatically declined, and they receive scarcely any positive news coverage in the media. The management board have high hopes in Sarah's abilities to remobilise the team and bring the NGO out of this crisis.

After one month, Sarah summarises her initial observations: the team members talk and argue during work meetings. They are inattentive and don't ask any questions. Everyone fights for their own solutions without considering anyone else's point of view. They act defensively – the team doesn't take any risks to try find new ways of working. Sarah was overwhelmed by how many colleagues complained, made excuses for their mistakes, and tried to find someone else to shift the blame to. She was surprised to see so many experienced colleagues coming to her for instructions and asking her what they should do. The team's passivity was noticeable. They expected her to be a super expert who could show them some magic tricks that would lead to guaranteed positive results.

This culture of working was far removed from Sarah's idea of efficient and independent cooperation. She knew that if she wanted to achieve long-term success with the team then there had to be a shift in the team and in the individual co-workers: a development of their skills, an increase in their autonomy, a strengthening of their confidence and a change to their beliefs about the target group that they were addressing. Sarah wanted the co-workers to use their potential and their talents, and to be prepared to go in new directions without being afraid of failure.

Sarah's predecessor had primarily operated with the team on an operational level. He frequently engaged in five-minute conversations, where he listened to the challenges facing the staff, made decisions, and expected the employees to put them into practice. Sarah's leadership style followed a coaching approach. She refused to make decisions for her employees. She listened carefully, asked focussed questions, and expected everyone to find solutions for problems themselves. She knew that this new way of leading would cause confusion and perhaps even resistance. Her colleagues initially kept on demanding that she makes a decision. Sarah then invited them to think more about it.

The employees' stereotypical fear that coaching meant hour-long conversations and decisions that Sarah could simply have made herself in a few minutes was soon put to rest. Experience shows that these conversations usually don't last longer than 5 minutes. Sarah is experienced and sometimes it is even enough for her to ask a single forceful question for Sarah to draw out a new solution from her conversation partner, rather than advising them or giving them instructions.

Over time, the quality of the staff's own solutions increased. They became increasingly interested in the approaches of others within the team and began to help each other and learn from each other. They learned a lot from their coaching experiences with Sarah, including how to listen closely, to ask targeted questions, to create plans for action, and to build good working relationships. They noticed that this way of working rubbed off on their interaction as a team and with the NGO's target group and were pleased to see the positive feedback and increased success that they enjoyed.

The difference was not immediately obvious. After one year, the team had achieved a slight increase in members and some limited media success. Their development was sustainable, however, because for the first time in the team's history their positive development was not built on selectively increased effort but on increasing maturity, new skills, and the team's autonomy.

In a nutshell

Initially, coaching was a method of working where organisations relied on external professional. The approach proved so successful that leaders made coaching part of their inclusive leadership culture - even without external support. The tips and working techniques described in this tool provide an answer to the question 'How can inclusive leadership be implemented with coaching in practice?'.

A leader who acts as a coach supports their colleagues – also called coachees - to achieve their goals by having thought-provoking and creative conversations. They set ambitious goals, unlock their potential, and expand their self-awareness, enabling them to strive for actions that once seemed out of reach. The basic principle of this process is the autonomy and choice of the coachee. The leader's role as a coach is not to give advice. The leader directs his interventions to raise awareness of options and increase the coachee's sense of impact on reality.

According to the International Coach Federation*, when you act as a coach, your responsibility is to:

- Discover, clarify, and align with what the coachee wants to achieve.
- Encourage coachee self-discovery.
- Elicit coachee-generated solutions and strategies.
- Hold the coachee responsible and accountable.

* https://coachfederation.org

INSTRUCTIONS

Coaching is an easy and quick method to use, but it requires some knowledge and practice if you want to use it successfully as a leader. Below you will find information on three topics:

- What is special about coaching?
- How do you develop the attitudes and skills of a leader as a coach?
- How do you discover what your coachee needs?

What is special about coaching?

Good coaching is not dependent on time. After an effective coaching session, coachees understand that they can and have the resources to achieve their goals; they see new opportunities for action and a clear path to achieving the goal.

Coaching awakens inner motivation

The external motivation of carrot-and-stick rewards and punishments causes people to act, but there is no chance of this awakening their creativity. Commitment drops as soon as the rewards or punishments disappear. Coaching allows you to get to the inner, individual sources of an employee's motivation. It connects work with the personal WHY? (see 'golden circle' tool). Such motivation leads to more lasting, grounded commitment.

Coaching is based on a partnership

Coaching as a method of working assumes that people are resourceful and creative by nature. They are not broken and do not need to be fixed. Interaction is based on the 'I am OK, you are OK' approach (cf. tool 'life positions'). The leader is neither better nor brighter. They are there to help the coachee unlock their potential, expand their awareness, and find a way to achieve their goals.

Coaching leads to sustainable transformation

Any external change requires an internal transformation. For example, becoming an inclusive leader requires you to let go of limiting beliefs, develop new skills, and expand your self-awareness. The external change, which is visible to observers looking in on your organisation, will reflect your internal transformation. Coaching supports this process of transformation. If nothing needs to change, coaching is not required.

Coaching is goal-oriented

Coaching activities are aimed at achieving a goal that is clearly defined. What do you want to achieve? How will you know if you have reached the goal? These are some key questions that must be asked before change begins. Having a clear purpose distinguishes

coaching from other forms of personal development.

Coaching increases ownership

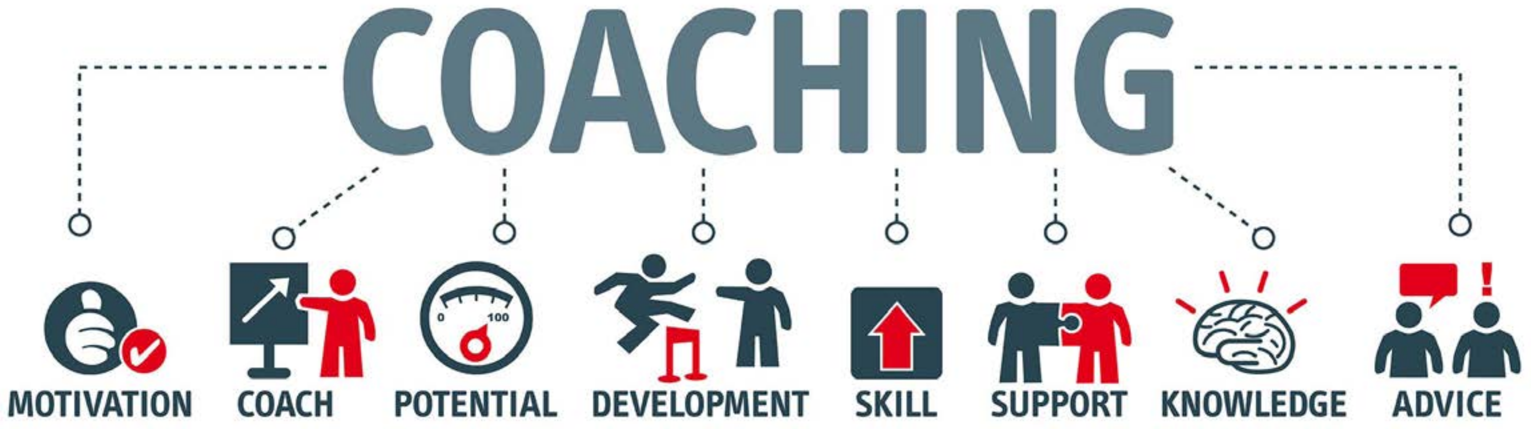
When co-workers avoid taking responsibility, the problem is usually not they themselves but the leadership style they are under. Coaching allows team members to see the connection between professional goals and their own identity, value systems, and sense of purpose in life. The choice and autonomy of the coachee are crucial components of coaching. All this leads to increased ownership, responsibility, and accountability.

Coaching leads to growth

As Albert Einstein said, no problem can be solved from the same level of consciousness that created it. With the present level of insight, skills, knowledge, people have the current results. If they want other effects, they need to go to a higher level of self-awareness. If the coachee answers your questions quickly and fluently, it means they already knew this and are not discovering anything new. This knowledge has led them to the current results. There is usually silence after a good, revealing question, and the answers are not slick or well-practiced. Growth is required to achieve better results.

Qualities of a leader who acts as a coach

- Likes to share responsibility.
- Believes that team members are resourceful.
- Encourages reasonable risk-taking.
- Believes that their main responsibility is to work towards other people's growth and development.
- Likes to listen without rushing to judgement.
- Encourages others to overcome barriers and to think.
- Makes people feel a sense of ownership and accountability for their actions.



Challenges in coaching

It may seem that there is nothing easier than setting a goal, recognising the gap between the current and the target state, identifying strengths and opportunities to act, and then taking action to close this gap and achieve results. However, in the process of change there can be many developmental barriers that prevent the coachee from achieving their goals. These can be:

- Fixed mindset.
- A dilemma or inner conflict expressed in the fact that one part of the coachee wants to achieve the goal and make a change, while the other wants to maintain the status quo.
- Fear of losing control, status, competence, familiarity and so on.
- Personal saboteurs[1] are understood as inner voices that represent automated mental patterns for thinking, feeling, and reacting. They cause self-doubt, anxiety, frustration, distress, or unhappiness.
- Taking on the role of a victim and failing to see one's impact on reality (for more information see the tool 'drama triangle').
- Confusion, struggling to make choice, i.e., stuck in the deliberation stage; experiencing comfort as long as all options are available, at least on paper; the moment of making a decision and moving to action creates strong tension.
- Limiting beliefs about yourself (e.g., I don't have the ability...), relationships (e.g., it's not right..., you should...) and the world (e.g. what works and what doesn't work).
- Short-lived enthusiasm - making fast decisions on a high of excitement without thinking about what will happen when the initial wave of elation dies down.
- Lack of vision. It is possible for a person to clearly name what they do not want, but it is difficult to name positive goals. A person then acts primarily out of fear. However, as soon as the threat disappears, the person simply gives up.
- Failure to recognise the possibilities. A schematic, narrow view of reality quickly leads to the conclusion that 'it can't be done'.
- Lack of self-awareness about one's strengths, skills, and resources that leads to not taking on challenges.
- Lack of awareness about one's limitations that leads to a reckless bravado when taking on a challenge, only to withdraw after the first failure.
- Paralysing fear of failure.

You probably know that it is not enough to tell people 'not to worry' if they are to overcome their limitations. Coaching requires leaders to have transformative conversations. This is far from giving trite advice that doesn't work. If you are interested in applying coaching as an inclusive leader, use the following guidance to have deep conversations that lead to seismic change.

[1] If you want to discover your inner saboteurs take the test: https://www.positiveintelligence.com/saboteurs/. Also read the tool 'inner drivers' in this chapter.

How do you develop the attitudes and skills of a leader as a coach?

Coaching is a type of conversation where the coachee is transformed from the inside out. Using the discoveries and insights gained during the dialogue, the coachee starts to act in a new way and strives towards a fixed goal.

It is a non-directive way of working which requires you to develop the following 5 approaches and skills:

1. Growth mindset

Do you believe that your intelligence is hard wired and can't be changed much? Or, on the other hand, maybe you think that you can always substantially change how intelligent you are. Perhaps you believe that you are a certain kind of person, and there is not much that can be done to change that. Or maybe you identify more with the statement that no matter what kind of person you are, you can always change substantially.

These statements about intelligence, ability, and personal qualities reflect two different mindsets: a growth mindset and a fixed mindset.

People with a growth mindset believe that intelligence, talents, and abilities can be developed over time. They believe that:

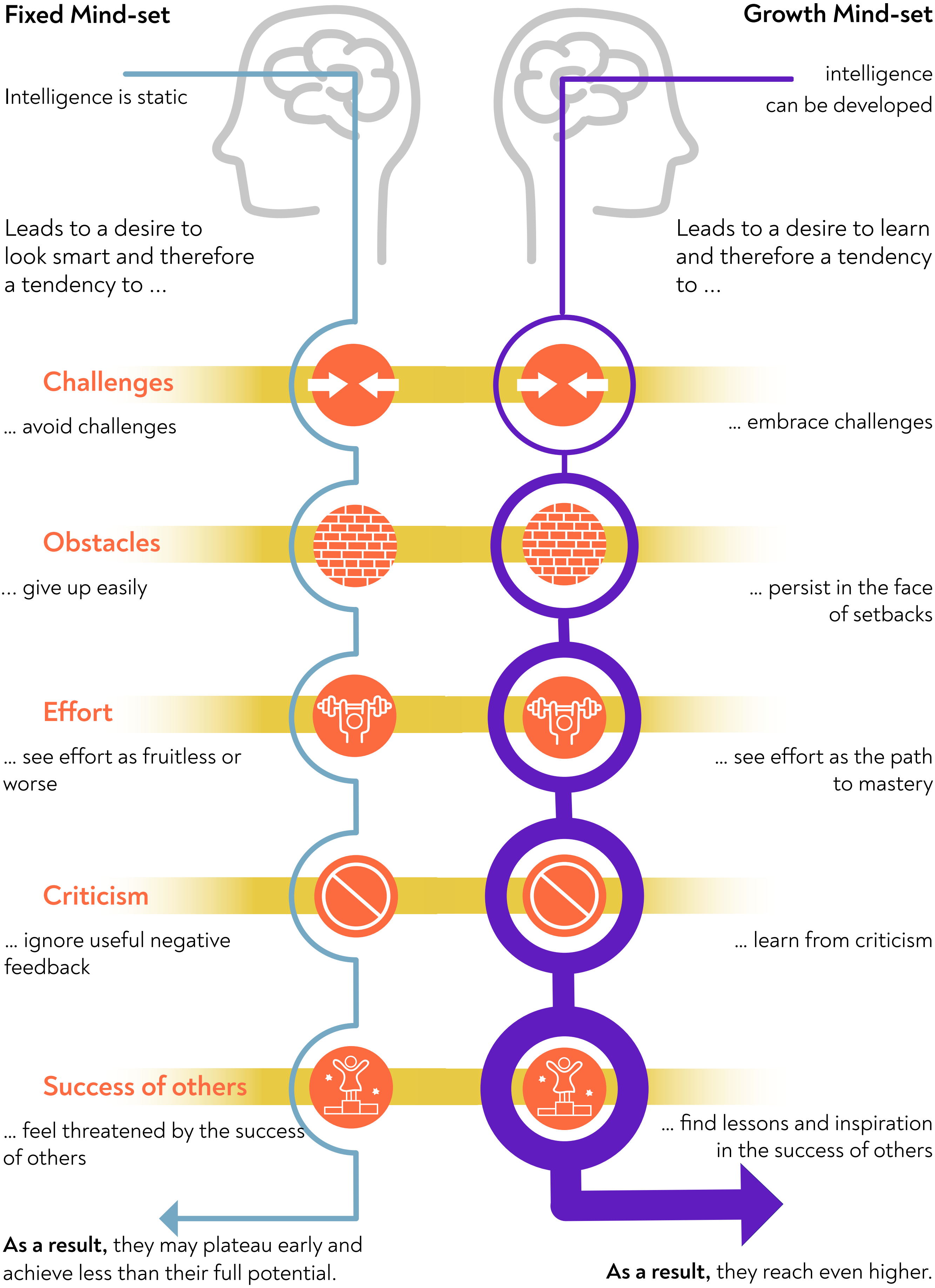
- practice makes perfect.
- the harder you work at something, the better you will be.
- talents and skills are developed through work and commitment.
- people can learn, unlearn, and relearn.
- the takeaway from failure is 'not yet'.
- even hard feedback and failures are an opportunity to grow.

People with a fixed mindset believe that intelligence, talents, and abilities are fixed and cannot be changed. They believe that:

- either you're good at something or you should give up.
- fixed talents determine success. The world is divided into people with many talents and people with few.
- no matter how hard you try, you won't get good results if you weren't born for it.
- intelligence is something set in a stone and you can't change it very much.
- talented people don't have to put effort into actions.
- the takeaway from failure is 'I'm not cut out for this'.
- it's better to avoid trying because hard feedback and failures hurt.

Many people have a fixed mindset. However, it is not only natural talent, but a willingness to learn and continuous, systematic work that is usually behind success. A fixed mindset or a mindset oriented towards growth influences the way we perceive challenges, obstacles, efforts, criticism, or the success of others. The following graphic illustrates the differences.

Two mindsets*



* The above graphic was originally created by Nigel Holmes. It can be found in: Carol Dweck: Mindset. Changing The Way You Think To Fulfil Your Potential; page 263; see 'Resources' below.

A fixed mindset limits the effects of coaching because people with this mindset are less likely to put effort into learning. At the same time, coaching can be a way to change the coachee's mindset. Targeted questions will help with this.

Questions to think about:

- Which mindset describes you best?
- How can you develop a growth mindset?
- Which approach describes your team or individual team members best?
- How can you develop a growth mindset in your team?

2. Asking powerful questions

The person asking the questions determines the direction of the conversation. The way you ask questions affects whether the conversation will be transformative or remain shallow.

Imagine team leader Claudia who has difficulties in intergenerational collaboration. She is a little over 50 and complains about working with Generation Z (those born between 1997 and 2012). She prides herself on her work ethic that she 'lives to work', and grumbles about her young colleagues who 'work to live'. In a career development meeting with her unit manager, Michael, she pours out her frustration. Michael could respond with one of the following questions:

- Don't you think it's time for a holiday?
- Have you not thought about hiring your peers?
- How many Generation Z members of staff have you hired?
- Have you set up your office in line with new trends to meet the needs of young people?
- What assumptions do you have about Generation Z that make it difficult for you to understand the generation?
- What can you learn from Generation Z?

Grammatically, each of these sentences is a question. However, reading them, you can probably sense intuitively that some of them will make the coachee defensive, some of them smuggle in ready-made advice, and some of them don't offer much in the way of new insights. Only some of them invite you to change your perspective and to understand the situation better so that actions can be taken which were previously beyond the reach of the coachee. We call these types of questions 'powerful'. The essence of coaching is to ask powerful questions.

Powerful questions provoke you to think and step outside of the box. They allow you to discover deeper meaning and make your conversations more reflective. These kinds of questions help explore alternatives and uncover new possibilities. They reveal energy, cause movement and awake creativity. And finally, they provoke more inquiry, insight, and further questions.

Formulating powerful questions requires practice. Although you can find manuals with lists of essential questions, the most important thing is that a good question arises out of deep and careful listening. This is more a combination of empathy, sensitivity, intuition, and experience than technique. So how do you know if a question is powerful? How can you start to ask meaningful questions?

Inspiration for formulating powerful coaching questions*

- Is the question relevant to the real-life and authentic work of the people exploring it?
- Is this a genuine question – a question to which you really don't know the answer?
- What is your intention with the question? What kind of conversation, what thoughts and feelings should this question evoke in those who will be exploring it?
- Is this question likely to invite fresh thinking / feelings? Is it familiar enough to be recognizable and relevant - and different enough to call forward a new response?
- What assumptions or beliefs are embedded in the way this question is constructed?
- Is this question likely to generate hope, imagination, engagement, creative action, and new possibilities or likely to increase a focus on past problems and obstacles?
- Does this question leave room for new and different questions to be raised as the initial question is explored?

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* Source: Eric E. Vogt; Juanita Brown; David Isaacs: The Art of Powerful Questions. Catalyzing Insight, Innovation, and Action; page 7; see also 'Resources' below.

Key tips:

- Ask open-ended questions.
- Avoid questions to which you know the answer or that suggest solutions (this turns the conversation into an examination and 'guessing' rather than discovery).
- Avoid asking 'why' in contexts that may elicit defensive responses.
  - Good why: Why do you want to have that exactly?
  - Bad why: Why did you offer the customer this specific solution?
- Avoid asking several questions at the same time.
- Use the plural. Ask 'what are the ways?' rather than 'what is the way?'.
- Practice asking simple, short questions. Avoid lengthy introductions and complicated formulas.

3. Deep listening

Everything in coaching starts with listening. How you listen will impact how you respond, the questions you ask and the direction the conversation takes.

Imagine someone saying: 'Our client is an idiot; I can't work with them'. A leader can respond in different ways:

- 'I know, I know, just do your job'.
- 'Each team member has one difficult client. '
- 'Send them a formal letter asking them to live up to their contract. Please.'
- 'I can hear that you value competence and collaboration, and this is not happening in the relationship with this client? Am I right? What is happening?'

Imagine a radio that broadcasts on different frequencies. Depending on what waves you tune the radio too, that's the programme you'll hear. It is the same with listening.

Depending on the 'frequency' you are listening to, you will listen to different things and react in different ways.

The response is always a reflection of the frequency – the level at which you listened to your interlocutor. We can distinguish between **4 levels of listening:**

The **first level** is to avoid listening. You don't take in or process the information, nor do you relate to it. You hear, but you don't listen. You don't consider what your interlocutor says even if you appear to be listening (e.g., you are nodding, but at the same time you are simply drifting off in your own thoughts).

The **second level** is defensive listening. You treat the interlocutor's statement as an attack. Your goal is to defend your position, justify yourself, and save face. This level of listening is characterised by lengthy exchanges in which everyone wants to be heard and considered but is still not heard. There are winners and losers at this level.

The **third level** of listening is listening to respond. This type of listening is characterised by giving solutions, good advice, and moving quickly to action. You advise without being sure that it is what your interlocutor needs. Although the answers may be good, the other person often replies, 'it won't work for me', or ends the conversation feeling misunderstood.

The **fourth level** of listening is empathic listening, in which you fully notice the psychological needs and feelings of the other party. You take their perspective on board and show proper understanding. This level of listening adds excellent value to the conversation. Often, all it takes is deep listening and reflecting from this level what you have heard from your interlocutor to change the conversation's trajectory. Through empathic listening, your interlocutor better grasps what is of primary importance to them and where there is a need for action or development.

In the example above, the four responses correspond to the four levels of listening. Notice how the conversation could differ depending on the leader's listening level. Active listening is an essential skill of an inclusive leader, and it requires practice.[2]

4. Mindfulness

Recall a moment in your life when time seemed to stop. You did not dwell on the past; you did not plan the future; your thoughts did not run anywhere. You were completely immersed in the here and now. You can easily achieve this state while playing sports, learning a new skill, indulging in a hobby, enjoying food, or relaxing. Mindfulness is the ability to be in the present moment, noticing and accepting what is happening at the level of thoughts, feelings, and body impressions. It is a state in which you are in complete contact with yourself and the outside world. In this state, your mind accepts everything that is happening and leaves judging behind. Living in the here and now significantly influences the depth of contact, attention, and understanding of the interlocutor. You can practice mindfulness by being mindful: breathing, listening, seeing, focusing on other senses, impressions, or body scanning.

5. Attitude of curiosity

Recall a situation in which someone said something contrary to your beliefs. How did you react? Did you feel your blood pressure rising? Did you feel like defending your own opinion? Or did you feel a buzz of curiosity and a desire to understand the other person's perspective? It is easier to be curious when you accept and respect diversity. Curiosity also means being open to and fully accepting the other person. The curious mind is directed towards a more profound understanding, rather than judging or convincing. An attitude of curiosity involves attention, kindness, a desire to understand the world of the person we are talking to, their life, the way they work and act in many ways – e.g., life mission, values, beliefs, skills, environment, and cultural background. It is the ability to accept and be open with the other person without judging them. It requires being unbiased (read the 'unconscious bias' tool to get more information). Being curious about the interlocutor makes the interlocutor more involved in the conversation and creates space for them to open up.

[2] A helpful exercise on the topic of 'Different ways of listening' can be found in the 'Inclusive Leadership - Manual for Trainers'. Information on the manual and the EU project 'Inclusive Leadership' can be found below under resources.

The GROW model

The GROW model is one of the better-known tools for supporting the development of coachees. Inspired by Timothy Gallwey's practice and developed in parallel by several coaches mainly associated with the sports community, it quickly became a tool for development consultants and coaches of all specialities. The model’s success stems from its universality, simplicity and applicability to any problem and work context.

The purpose of using the GROW model is to structure the activities that support the co-worker’s development, to plan activities, and make ongoing decisions during individual meetings and throughout the process.

G R O W

Goal
What's your goal?

Reality
What is your current situation?

Options
What are your options for moving forward?

Will
What will you do now?

GROW is an acronym for the four crucial elements that should be considered when working on personal development and change.

Goal: A goal is a picture of the desired state toward which the development should aim.

Reality: Reality is the current situation, potential, and place in the development process where a person is now.

Options: Options are alternative ways and means by which a person can achieve what is desired.

Way Forward: Way forward is the essence of motivation and genuine commitment to working towards a goal.

Each of these elements can be treated as a work phase and an indication of what the coach should look for to facilitate the process effectively.

The GROW model serves as a map of the journey a coachee takes as they work on their development. Your role is to help them define the model's elements and organise this process.

Start by defining the goal and describing reality. Although the classic model indicates the need to name the goal first, practice shows that many coachees prefer to start by thinking about their situation and then formulating their intentions. You can therefore treat these two elements interchangeably, adjusting their order to meet the needs of the coachee.

Use the graphic in your coaching activity and point to the area that you are working on. Support the coachee by asking questions.

Examples of questions to define a goal

- What do you want to accomplish?
- Where do you want to get to in this area?
- How will you know if the goal has been achieved?

Examples of questions to describe the reality

- What happened, where and when?
- What was the course of events?
- How do you feel about it, how do you perceive it?

After characterising the goal and reality, you show the coachee that further development requires connecting these two points on the map.

You can now find out how the coachee is moving from their current situation to the desired situation. Your work on the possibilities (actions, reactions, initiatives, etc.) begins. Your role is to support the discovery and creation of new options.

Examples of questions to widen the view for possibilities

- How else could you do this?
- What could you do to make these constraints go away?
- How would your role model do it?

Finally, the coachee's will to act is strengthened by reviewing the options worked out and choosing one of the alternative courses of action to achieve their goal. Strengthening the coachee's motivation is a long-term and permanent activity.

Examples of questions for planning further actions

- Where will you start now?
- Why is this important to you?
- What will you gain from this action, how will you benefit from it?

The GROW model can be successfully used in a single meeting where you first define the current situation and immediate goals and then look for options and strengthen the will to act. It can also be used to structure a longer coaching process. The first conversations are devoted primarily to describing the reality and the goals, and the subsequent ones to designing and implementing optional solutions and strengthening the coachee's will.

How do you discover what your coachee needs?

The practice of coaching leaders shows that many of the conversations with team members take place in the hallway. They often last no longer than 5-10 minutes. Applying the whole GROW model during this time can be challenging. These conversations can also lead to fresh insights, new ways of looking at a problem, transformed attitudes, increased motivation, or finding the courage to try new ways of doing things.

Effective coaching is not based on one learned model of conversation. It requires you to be genuinely present and consciously decide which type of intervention is best for this specific conversation. Use different coaching approaches depending on the goal of the conversation or where your coachee is having difficulties. Robert Hargrove defines seven types of master coaching (see 'Resources' section below).

Seven types of master coaching conversations according to Robert Hargrove

In the following you will find behavioural and mental patterns of coachees, goals you are pursuing in your coaching, and methods for achieving these goals.

1. Declaring new possibilities	
Coachee	• Resignation • Seeing only one option for action • Statements: 'I have no choice' • Expressing conventional solutions that they already knew about
Goals	• Breaking through limiting beliefs • Increasing flexibility in action • Experimenting with new ways of doing things
Methods	• Brainstorming • Example questions: ◦ What is possible? ◦ How could it be done differently? ◦ What would x do in this situation? ◦ What might be the benefit of letting go of the old way of doing things? ◦ What would you change about your action if you allowed more humour and fun?

2. Thinking partner	
Coachee	• Is looking for a sparring partner to contrast their viewpoint • Has a dilemma about which options to choose • Can describe the problem quickly but there are no simple or obvious solutions
Goals	• Breaking through limiting beliefs • Searching for the best idea

Methods	• Questioning everything that could be taken for granted
	• Deepening methods to avoid hasty conclusions
	• Talking about concerns, risks, and impacts
	• Visualisation methods such as a risk matrix can be helpful (see examples of templates below in 'Resources' section)
	• Example questions:
	  ◦ What assumptions have you made?
	  ◦ What could go wrong?
	  ◦ What conditions must be met for your solution to work erfectly?
	  ◦ What risks do you see?
	  ◦ How can you deal with these risks?

3. Drawing others out	
Coachee	• Has an idea but does not express / specify it • Rejects your advice and the advice of other team members
Goals	• Extracting options and possibilities from the coachee to increase their responsibility and identification with the possible solutions • Increasing their autonomy and responsibility; empowerment
Methods	• Start with the assumption that the coachee knows the answers • Bring out their feelings, reactions, and conclusions, then analyse them • Example questions: ◦ What can you change about this situation? ◦ What could be the benefits of …? ◦ What does … mean to you? ◦ What would have to happen for that … to happen?

4. Reframing	
Coachee	• Holds limiting beliefs and assumptions • Reluctant to make an intellectual effort to find a solution • Is pessimistic
Goals	• Changing limiting beliefs • Transforming mindsets • Broadening perspectives • Empowerment
Methods	• Pointing out that the beliefs we have developed impact the outcome of our work • Example questions ◦ What assumptions are you making? ◦ How might you think differently about this situation? ◦ What are you avoiding? ◦ What are you not allowing? ◦ What filter are you looking at this situation through? ◦ What is possible when you assume that ...? • Encourage a change of perspective ◦ The coachee talks a lot about feelings. Coach response: focus on facts and choose fact-based language ◦ The coachee talks a lot about business indicators. Coach's reaction: Address the coachee's feelings, those of the team and the reactions of others involved • Do not get into an exchange of arguments about what is and what is not possible. Ask about assumptions

5. Advising and learning	
Coachee	• Asks for advice • Will benefit from the introduction of completely new options that were not previously available
Goals	• Sharing experience while keeping choice and responsibility with the coachee
Methods	• Using metaphors • Sharing the experience of others • Sharing one's own experience ◦ I once acted like this in a similar situation: ... What is helpful to you from this? ◦ I once came across ... as a solution approach. What do you take from this for yourself? ◦ I recently saw a video that ... What from this resembles your situation? • When asked by clients for advice, Milton Ericson often started a list that indicated many possible alternatives. He said, for example: ‘Some people in your situation might call, go there in person, send a letter, etc. What would be the best option for you to get what you want out of this situation?’* * Example taken from Marilyn Atkinson, Rae T. Chois: The Art & Science of Coaching; see ’Resources’.

6. Forwarding action	
Coachee	• Is ready to decide to act after gaining more insight into the situation and broadening perspectives
Goals	• Working out an action plan that is possible to implement • Focusing on small steps forward that do not cause them to be overwhelmed
Methods	• Setting up an action plan • Follow-up • Appreciating their effort • Example questions and statements ◦ Given all the options, which of these ideas do you want to implement? ◦ What have you decided to do? ◦ What will be your first step? ◦ Let's set up a meeting to discuss the progress of imple-mentation. ◦ This was a productive conversation. We ended up with conclusions that we didn't consider at all at the beginning. I look forward to seeing the first results of their implemen-tation!

7. Giving honest feedback	
Coachee	• Will benefit from seeing their own 'blind spots'. Knowledge about oneself is visible to others but inaccessible to the person themselves • Needs reinforcement and encouragement
Goals	• Increased self-efficacy through a better understanding of oneself and the impact on other people
Methods	• Fact-based language • Giving feedback (read the tool 'giving getting feedback')

Questions to think about:

- Which of these seven coaching conversation approaches is closest to your natural way of talking with team members?
- Which one do you not use or use least?
- Which style do you want to learn first?
- How will you start?

DAY-TO-DAY SUPPORT

- Coaching is a method for supporting the coachee in their growth and transformation. You will have more effective conversations if you gain a better understanding of the process of change, different motivations, how new habits are formed, and how to identify internal saboteurs and sources of resistance. Continuously growing in your awareness and skills in these areas will increase the effectiveness of your conversations.
- When learning to coach, the most important thing is practice. Just start and experiment, allowing yourself to make mistakes.
- The reluctance of team members to engage in coaching is partly related to unmet or unattainable expectations. Sometimes they are not ready to act, they just want to be empathetically listened to. Sometimes they expect simple advice. Ask the coachee about their expectations. Mutual feedback (see tool 'giving getting feedback') and clearly stating the contract at the beginning of a coaching process are important. In a 'coaching contract', you jointly clarify expectations and objectives, as well as what you as a coach can contribute to that specific case. This enables you to adapt the coaching to the coachee's needs on the one hand, and to create transparency and clarity from the very beginning on the other hand.
- It can be worrying for beginner coaches to hear the answer 'I don't know' when they ask a good question. However, this is one of the best answers you can listen to. It means that the coachee has a chance to uncover something new. How should you respond when the coachee says 'I don't know'?
    - When the coachee says 'I don't know, you tell me', do not offer solutions. Respond, for example, by repeating the facts available.
      If the coachee has already rejected several solutions, say the following: 'We have already talked about three possibilities, all of which you reject. I'm afraid a fourth option won't help you either'.
    - You may also think that the answer 'I don't know' is the only possible answer and respond as follows: 'It is obvious that you don't have an answer and I look forward to discovering a solution with you. All the obvious solutions have been discarded. We now have the chance to discover something completely new.'
    - Resist the temptation to fill the silence. Explain why you are not providing solutions.
- Sometimes, you may experience resistance from your coachee about generating ideas. The person is afraid of brainstorming because they unconsciously feel obliged to implement the ideas and do not yet know the consequences. This kills creativity and prevents the coachee from thinking outside of the box. How can you deal with this resistance?
    - Avoid a commanding tone.
    - When asking questions, use the hypothetical mode instead of the indicative mode. 'What could you hypothetically do?'
    - After developing different ideas, ask the coachee to consider which option they are willing to put into practice.
- The essence of coaching is not to give advice or to force anything, but to allow freedom and to accept when the coachee rejects possible solutions. The coachee chooses a course of action because he is inwardly convinced, not because you prescribe it. When giving advice, ask yourself beforehand if it is appropriate and

necessary. Do not take shortcuts: do not give advice because you have no patience, cannot bear the tension caused by silence or are afraid of being perceived as incompetent.

- End every coaching conversation, even a short one, with a 'take-away':
  - What do you take away for yourself from what we talked about?
  - What has been most meaningful to you?
  - What is your next step?

RESOURCES

Recommendations:

Hargrove, Robert (2008): Masterful Coaching; Pfeiffer.

Atkinson, Marilyn; Chois, Rae T. (2012): The Art & Science of Coaching. Inner Dynamics of Coaching; Exalon Publishing.

Dweck, Carol (2017): Mindset. Changing The Way You Think To Fulfil Your Potential; Robinson.

Vogt, Eric E.; Brown, Juanita; Isaacs, David (2003): The Art of Powerful Questions. Catalyzing Insight, Innovation, and Action:
https://docplayer.net/296726-The-art-of-powerful-questions.html

School for Leaders Foundation; Alp; EU-Fundraising Association (2018): Inclusive Leadership – Manual for Trainers: https://inclusiveleadership.eu/inclusive-leadership-manual-for-trainers/

Brown, Saul W.; Grant, Anthony M. (2010): From GROW to GROUP: Theoretical issues and a practical model for group coaching in organisations:
https://www.researchgate.net/publication/233237153_From_GROW_to_GROUP_Theoretical_issues_and_a_practical_model_for_group_coaching_in_organisations

Risk Matrix Template: https://miro.com/templates/risk-matrix/

Video: Dweck, Carol (TED Talk): The power of believing that you can improve:
https://www.ted.com/talks/carol_dweck_the_power_of_believing_that_you_can_improve

#coaching #grow #grow model

20 Team Contract

'Contracts are not a guarantee that people will get on with each other. But they do cement the good will that made them possible.'
Ernst Reinhardt

Benefits

When is this method useful?

- When you want to create a working environment together with your team that takes everyone's needs into account, thereby making it possible to work together more pleasantly with team members who are more content.
- When you want to prevent conflicts arising in your team due to unclear rules. When it should be clear to everyone in the team what should be done and what is not acceptable.
- When you want to lay the foundation for a productive culture of feedback by having clear parameters for collaborative work and by making both positive and negative deviations from this easily identifiable.
- When you want to encourage commitment and individual responsibility in your team.
- When you want to use open dialogue in your team to make the behaviour of all those involved more transparent and to strengthen mutual trust.

From practice

A start-up in the technology sector employs a team of developers. Some members of the team are well known for their sarcasm and mean remarks that they hide behind intelligent and witty language. Those who feel hurt by these comments are viewed by the team as being stiff and less clever than others. They are often met with remarks such as 'What is wrong with you?' or 'Don't you have a sense of humour?'.

Anton, the team leader, was not happy with this way of communicating. He tolerated this behaviour for a long time because he viewed it as part of the IT work culture.

He also knew, however, that sarcasm is one well-disguised form of aggression. Sarcastic remarks don't constitute a direct attack, which means that those who feel attacked by them can be easily ridiculed by the group when they try to defend themselves or express their lack of understanding.

Anton invited the team to create a team contract together. He mentioned the topic of sarcasm during the meeting, which triggered an intense discussion. Some did not want to give up their sarcastic statements because they viewed them as important for the team's identity. Others made clear that they found the sarcasm to be hurtful. Anton made sure that everyone was given equal space to express themselves and share their thoughts on the topic of sarcasm.

Once all opinions had been listened too, Anton challenged the team to spend time thinking about the benefit of sarcasm and what it would mean to do without it. It became clear that sarcasm provided humour, helped reduce stress, and could be a way of expressing discontentment without resorting to conflict. By doing without sarcasm, however, exclusion in the team would be reduced, everyone would take more responsibility for their own comments, and a more partner-like exchange between everyone in the team would be possible.

As a result, the team agreed to express individual criticism directly to those whom it was aimed at. Sarcasm can continue to be used in meetings if it does not directly hurt other team members. They also agreed that the whole team was responsible for implementing this rule that they had made together. Everyone made a commitment to respond if sarcasm gained the upper hand and had a disruptive effect on the team.

In a nutshell

All teams work according to rules that determine the way they work together. Even if these are not explicitly expressed, they are still present and are viewed by the team members as more or less binding. Failing to have an open discussion about shared rules will lead to every team member being led primarily by their own convictions. The result is typically a mishmash of different standards of behaviour that often only come to light when conflict arises. If clearly defined, collaboratively formulated rules are lacking, it can lead in any team to friction losses and exacerbated conflicts. You can avoid them as far as possible by creating a team contract.

A team contract clearly regulates the desired way of working together and lays down transparent targets for all team members. This makes it clear what is wanted and what is not wanted. Amongst other things, the contract affects daily work together and makes it easier to give feedback to each other through a written record of rules, guidelines, and ways of behaving. It becomes easier to solve conflicts or, in a best-case scenario, they do not even emerge in the first place.

The team contract is an important instrument for creating emotional security in a team. All team members know which ways of behaving are expected and which are not. The team contract makes it possible for inclusive leaders to establish shared rules that all those involved take responsibility for. This lends a greater binding force to the rules and motivates all those involved to personally assume responsibility for keeping the contract.

Team Contract

Name of the team:

In
What do we want?

Which rules and ways of behaving do we want to observe in our team?
Do we as individuals prefer a particular way of working?

Out
What do we not want?

Which behaviours do we want to consciously exclude in our team?
Which ways of working are unacceptable for us?

INSTRUCTIONS

Team facilitation

It is not difficult to mutually create a team contract. Follow the steps below and your work as a team can be continued on a better foundation.

1. Schedule a team meeting for roughly one hour.
2. Let your team know what the meeting will be about.
3. Invite your team to create a team contract. Explain what a team contract is about and what its purpose is. You could say, for example, that the purpose of a team contract is to establish which rules will help your team work together to meet organisational goals and to create a positive working atmosphere.
4. Provide the necessary materials: facilitation cards, pens, and pin boards. For online meetings, use applications such as Jamboard, Padlet or Mural, where all team members can work together creatively at the same time, and no one is excluded (cf. 'How to conduct online meetings' tool).
5. Discuss directly with your team which issues the team contract should cover. Explain that it should direct the way that the entire team works together and how all those involved interact with each other.
6. Determine rules together that will help you in your work. Ask yourselves the following questions:
   - What do we all find good or not good and what does everyone individually find good or not good?
   - How do we want to work together? How do we want to achieve our goals?
   - Which situations have a potential to cause conflict? How do we want to act when they arise?
   - What has worked for us up till now? What has not worked?
   - How do we want to solve conflicts?
7. Make sure that the team contract does not consist in a list of vague, positive cliches such as 'We will trust and respect each other and will work well together.'

These kinds of statements indicate good intentions but do not define any specific rules or guiding principles. If the statements in the team contract remain too superficial, for example 'We will trust each other', then you can ask yourselves:

- How will we know whether we are trusting each other?
- What kinds of behaviour will lead to us trusting each other?
- How do people who trust each other behave?
- Which of our current ways of behaving lower our trust? What specifically do we want to do about this?

8. In your team contract, use a description of the desired activities that are based on specific, observable ways of behaving.

Example	
A too generic rule: We will trust each other.	**A specific, observable rule:** At the end of a meeting, we will determine which information should be handled confidentially and which can be passed on.

9. Ensure that the rules, principles, or ways of behaving agreed on in the contract are formulated positively. Instead of writing 'We will not come too late', it is better to write 'We will be on time'.
10. You can divide the development of your team contract into two phases:
    - In the first phase the team members will gather their ideas or suggestions in pairs or in small groups.
    - In the second phase these ideas will be introduced to the whole team and discussed together.
11. This way of working will make clear which rules are shared by everyone, or at least by most people. These rules will be mentioned repeatedly by the separate small groups. It will be easier for you with this approach to identify rules or suggestions that are not shared by all members of the team and that should be discussed in more depth.
12. End the group work on the team contract when all those involved agree with the determined rules, guidelines, and ways of behaving.
13. One person from the group should take charge of the written formulation. It is better if this task is not carried out by one of the leaders.
14. Finish by discussing how you will carry out the final review of the formulated team contract together and decide as a team on a date when your contract will come into effect.

DAY-TO-DAY SUPPORT

Preparing the team meeting

When preparing the meeting to develop the team contract together, think about the following questions:

- From your perspective, what is working in the way the team is currently working together?
- What is not working?
- Which patterns of behaviour would you like to regulate in your team contract?
- How would you like to promote the collaborative creation of a team contract within your team?

Overcoming differences of opinion when suggesting rules

If differing opinions emerge when creating your team contract, for example part of the team agrees with a suggested principle whereas another part is not, then you can take the discussion further with the help of the following questions:

- Which values or needs underpin the rule being suggested for those who are in favour of it?
- Which values are being respected, or which needs are being met when it comes to those who are speaking out against the new rule?

Challenge your team to find a new rule that takes everyone's values and needs into account. Once the values and needs underpinning a specific form of behaviour have been revealed, it is generally easier to get to a result that satisfies everyone (cf. also the tool 'giving getting Feedback' on this topic). Conclude the discussion by checking whether those who originally suggested the new rule, as well as their critics, are happy.

Allow negative rules at first

Some people find it easier to articulate how collaborative work should not be. Although this goes against the principle of creating rules that are formulated in positive language, it may be that this principle of positive articulation prevents the active participation of some team members. In such an instance it is better to tolerate negative statements at first and then to rephrase them positively later. You could then ask, for example, 'If you don't want X to occur, then how should we proceed?'

Sign the team contract by hand and hang it up in a clearly visible location

It is a good idea for all those involved to sign the shared team contract by hand and then to give each team member personally a copy with all the signatures. This increases the sense of obligation and emphasises that the implementation of the contract comes down to everyone in the team. In addition to this, hang the contract up in a clearly visible location in the office (copy machine, coffee corner etc.) and think together about how the terms of the contract can be made visible 'on the side' to remote teams working online.

Team contract in practice – it won't take care of itself

Some leaders expect that the creation of a team contract with rules that have been fixed in writing will directly lead to some sort of change in the behaviour of the team members. In other words, a team that has problems with meeting deadlines would immediately deliver on time, simply because it has committed to do this in its team contract. In practice, it is not this easy. All those involved must take some time to 'learn' the new rules. As a leader, you can actively support this process of learning, for example by following the rules in the team contract yourself in a way that is noticeable to everyone. For example, if you have started an online meeting and not all the team members have appeared on time, then begin the session regardless without waiting for those who are not yet present.

Address aberrant behaviour directly

React immediately when you identify a discrepancy between the rules that have been collaboratively laid down in the team contract and your team's actual behaviour. Even more importantly: every team member receives explicitly the authority and the obligation to actively address any failure to keep the contract rules. Integrate this authorisation and obligation as a component in the contract. This will make clear that everyone is responsible for keeping these agreements together.

It should then be normal in a team meeting in the future for a participant to actively ask: 'We agreed that we would be on time. That isn't working at the moment: two colleagues were too late again today. What can we do to make sure that our rules are being kept? What is making it difficult to keep our team contract? Have we failed to take something into account? Do we need to adjust or expand our team contract?'

Move with the times – regularly adjust the team contract

Review your team contract from time to time. The team contract should be a helpful set of rules that makes it easier for everyone in the team to work together. Every team will grow or shrink, and there will be constant changes. You should respond to these in your team contract. Failing to do so will make the contract an ineffective tool and can even lead to a harmful rigidity that can come to light in statements such as 'We agreed to do it this way. Here it is in writing.' Don't let it get to this point. It is a good opportunity, for example, to review the contents of your team contract when a new team member is appointed. As a team, set a fixed date at least once a year when you will review the rules together and make any necessary adjustments.

RESOURCES

Recommendations for reading:

Mastrogiacomo, Stefano; Osterwalder, Alexander (2021): High-Impact Tools for Teams: 5 Tools to Align Team Members, Build Trust, and Get Results Fast; Wiley.

Hogan, Dan (2021): How to Facilitate Team Work Agreements: A Practical, 10-Step Process for Building a Right-Minded Team That Works as One; Lord & Hogan LLC.

George, Christeen (2009): The Psychological Contract: Managing and Developing Professional Groups; Open University Press.

#Team Contract #Rules #Conflict #Trust #Safety

21 Unconscious Bias

‘Through the alley of prejudice,
truth must constantly run the gauntlet.’
Indira Gandhi

Benefits

When is unconscious bias useful?

- When you've decided to become a more inclusive leader, but you don't know how to achieve this.
- When you want to move away from forming only homogeneous teams with people with similar backgrounds and values.
- When you want to create a team where all members activate their potential and grow.
- When you want to make decisions based on objective principles and create a fair working environment that all team members identify with.
- When you want to understand how, despite good intentions, you may unknowingly hinder the creativity of a high-performing team.

From practice

Kristina is a keen entrepreneur who invests intensively in her personal development. She strives to acquire new knowledge and skills, follows trends in her branch, and gets professional certifications that improve her competence. Initially directive in her leadership style, she saw the value of being an inclusive leader over time. She began to work intensively on transforming her leadership. In one of her courses she encountered the issue of unconscious bias. When she was interested in a topic, she was 100% committed and fully engaged. She was curious about the topic of unconscious bias and did the Implicit Association Test (IAT), which allows you to identify your unconscious biases. She was convinced that her openness distinguished her from others. The result showed that she was prejudiced against older adults. At first, she was outraged by the result. She was on the verge of questioning the validity of the study. However, she knew herself well enough to know that at crucial moments for her, she tended to react with fierce resistance. So, she decided to take time to examine her behaviour and relationships with older people.

She took a close look at her professional relationships. In her team she worked with people of the same generation (40+). Alongside her work, she was a university lecturer and a mentor for young entrepreneurs. She did not work with or learn from older people. It was as if her professional life ended with her peers. Her clients were also not any older, although her industry did not necessarily preclude this. She maintained good relationships with her immediate family members. However, she avoided large family gatherings where the older members of the family were present. Kristina blanked out older people from her life. She was ashamed to admit that her father's onset of dementia filled her with dread; her mother's increasingly repetitive stories irritated her. In Kristina's mind, old age was associated with a lack of modernity and the end of learning, both of which went against her value system. This was also fed by her own fear of dying.

Kristina decided to work on her bias. She began to consciously seek out and contact older interesting and successful people in her branch. To her surprise, there were many more than she expected. She found several such individuals, including those providing mentoring courses, and enrolled in one of their courses.

She attended the course with curiosity and openness, specifically choosing to work, practice and talk with older people. She began offering to work with people over the age of 60 whom she had previously avoided. Some of these new acquaintances developed into friendships. She became increasingly interested in literature and films created by older people. She followed articles about ageism and dealt with her bias on a weekly basis. After a year, she found that she was no longer impatient and anxious in her relationships with older people. She now has a better understanding of herself; she has loosened her cognitive fixations and become more flexible and open. Still, she feels that her bias has not yet changed as much as she would like. She notices that she falls back into old patterns of behaviour in stressful or tense situations. But then she tells herself, 'Kristina, remember, take a break - THINK - react.' She has learned to accept that working with unconscious biases is a lifelong process and there is no quick, one-time fix.

However, she also appreciates how much her horizons have broadened and how much her relationships have been enriched. Kristina changed her belief about older people's unwillingness to learn because she had gained several insights and experiences. Today, she knows that neither learning orientation nor wisdom is age dependent. Although the process is still ongoing, her team is now more diverse and understands the needs of customers of all generations.

In a nutshell

Implicit biases are unconscious attitudes or stereotypes. Although you are not aware of them, they drive your thoughts, emotions, choices, and behaviours. Even if you think you have a neutral attitude toward others and believe that objective criteria guide you, unconsciously, you might be driven by aversion or favouritism toward a person or group of people. Everyone has biases, and everyone is vulnerable to them. They are based on simplification and fast thinking[1] and can lead to exclusion.

Unconscious biases may conflict with conscious beliefs. E.g., because of your past experiences or education, you may think of yourself as promoting gender equity. At the same time, on an unconscious level, men may form an association with career and women with home. This may come from your upbringing, family models. It can push you into the trap of cognitive errors, simplifications during job interviews or promotions within your team. Being aware and educated about diversity and equality does not fully protect you from bias. Working on them is more of a long-term process than a one-time change.

What is the difference between explicit and implicit biases?

The former are linked to your conscious belief system. The latter have become automatically engrained through associations formed over a lifetime. They result from observations, not choices. Based on the example mentioned above - it is enough for you to have grown up in an environment of professionally inactive women and professionally active men to create an unconscious bias: 'career = male'. This can therefore influence the decisions you make towards your female, male and non-binary team members.

[1] Nobel laureate Daniel Kahneman explains in detail how two systems decide together in human thinking: system 1, which is fast, intuitive, and emotional, and system 2, which is slower and operates in a more deliberate and logical manner. Kahneman points out the pitfalls of fast thinking, including the influence of intuitive impressions on thoughts and the decision-making process. Read more at: Daniel Kahneman: Thinking, Fast and Slow; see Resources.

How are biases formed?

The formation of biases is influenced by …

- personal experiences, including traumas leading to generalisations. (For example, being assaulted by a person speaking with a foreign accent may cause resentment towards foreigners, while an assault by a person without a foreign accent does not cause an equally intense, general reluctance towards native speakers).
- messages coming from traditional media.
- messages coming from social media.
- your personal background and the impact of key people in your childhood.
- taking on the bias of the groups you belong to.
- cultural determinants.

What areas are affected by bias?

The human brain learns by making associations and connections between concepts. This process is called associative learning. One benefit is that it enables us to speak our native language correctly, even if we don't know the underlying grammatical rules. The brain itself recognises and links language patterns. One downside of associative learning, however, is stereotyping. For the brain, 'one trait makes a whole person.' Noticing one central, visible trait triggers a whole series of positive or negative associations projected onto that person.

Bias applies in ethnic affiliation, disability, gender, colour, sexuality, weight, religion, financial status, health, beauty, language, country of origin, homeownership, education, relationship status, political beliefs, and many others.

What are the consequences of unconscious bias?

Although unconscious bias does not arise out of ill will and is not intentional, acting under its influence can still harm others.

Your biases can be subtle. They will affect, for example, how much eye contact you maintain with the person you are biased against, the amount of attention you pay them, the quality of your active listening, the physical distance you maintain from that person, your tone of voice, the language you use and finally how supportive you are. Although these actions are subtle, they can have a significant result.

The following example illustrates how much influence unconscious biases can have:

Anna is looking for two new team members. She meets with two candidates.

Tim is a graduate of a prestigious university. Based on this fact alone, Anna feels that he is talented, hardworking, disciplined, and will perform well in the position offered to him.

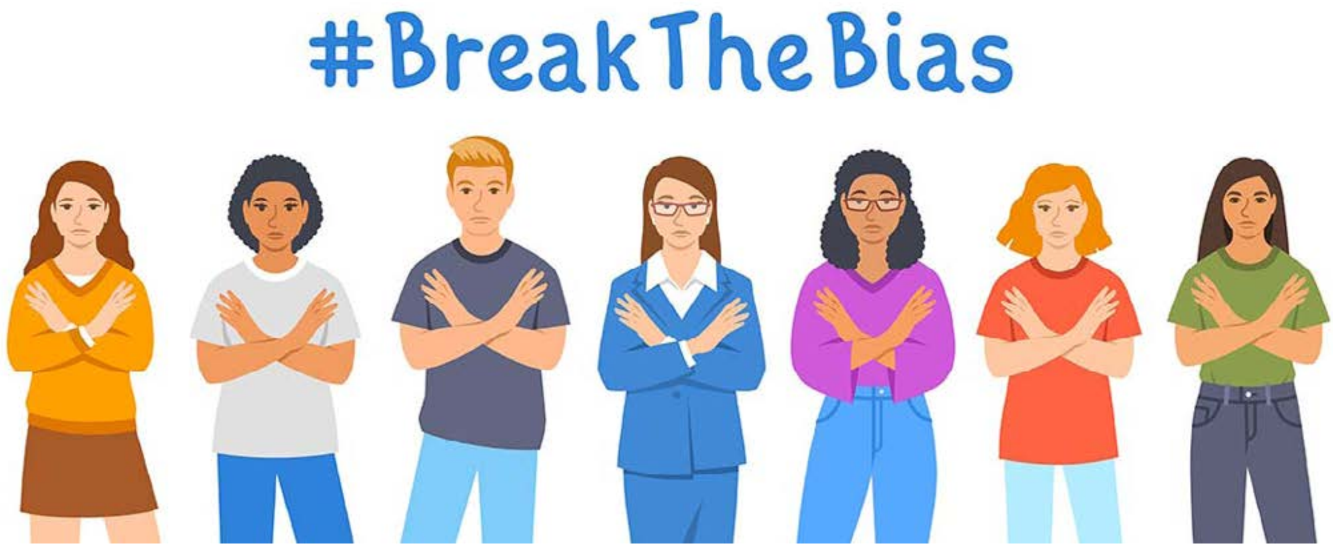
Daniel graduated from a local university. He also studied two years longer than the expected time. Anna feels that this is evidence of his inconsistency, lack of discipline, and talent.

Nevertheless, she hired both Tim and Daniel.

Objectively, the candidates had identical qualifications and potential. However, after three months, Tim had significantly better results. A differentiating factor was the degree of Anna's commitment to acclimatising both individuals. Tim received significantly more attention, support, encouragement, and feedback than Daniel. By these unconscious actions, Anna led to a self-fulfilling prophecy. In the end, she said, 'I knew it; I should trust my intuition more'.

Implicit biases also affect structural inequalities in the workplace. It can lead to unconscious facilitation or hindrance of employment, promotion, raises, potential development, and access to fringe and benefits.

Unconscious bias



INSTRUCTION

Working to overcome unconscious bias is a long-term process. First, it is about understanding unconscious biases and how they arise, and about accepting the fact that we are affected by them. The next step is to work on recognising our own biases. Finally, conscious action is required to change biases and minimise their consequences.

Can unconscious bias learning be prevented?

You can undoubtedly disrupt this automatic process through intention, attention, and time. Associations, including biased ones, are nothing more than neural connections in the brain. Initially, weak, physical contact is made between neurons. The more information you absorb that confirms a given association, the stronger the neural connection becomes. This way of thinking and reproducing information becomes more and more comfortable. At some point, the connection between the neurons forming a given association is as conveniently fast for the brain as a highway. By stopping and deliberate choosing to seek out experiences that go against your preconceptions, you begin to build an alternative route to that highway in your brain and form a new neural connection. Initially, this is like a poorly trodden path in a meadow competing with a main road. It is easy to see that this is a less convenient form of travel. On the flip-side, you can now stop the automatic chain of events. What you should watch out for is cockiness. The old highway in your brain remains. It is less travelled and neglected, but it still exists. Overconfidence and inattention can cause you not to know when or how you got back on the old tracks.

Seven steps to debias yourself

1. Reveal your biases

Taking the Harvard Implicit Association Test (IAT) can help reveal your biases. This tool can support you identify your unconscious, learned patterns of preferences.

For example, a leader who values gender equity and is sensitive to gender issues may discover that they associate women with interpersonal skills and men with scientific skills on an unconscious level. This information will be helpful, for example, when deciding to assign tasks in a team or recruiting for positions that require analytical, mathematical thinking. During the recruitment process, the leader could ask themself: ‘Do I prefer candidate X for a position because it requires analytical skills, and he is male?’ The exact opposite process may apply to the positive preference for selecting women for positions requiring interpersonal skills.

Go to: https://implicit.harvard.edu/implicit/takeatest.html and reveal your biases.

2. Stop – Think – React

Your responsibility is to stop automatic thoughts and decisions that biases may disturb. The biggest enemy of neutrality is being in a hurry. Give yourself time, stop, look at your choices for known biases. Have they distorted your decision-making process? Recall objective criteria. If in doubt, discuss your approach with someone who is not involved in the topic, which is close to an inclusive leadership approach.

3. Develop empathy skills

Consciously work on noticing the feelings and needs of people, especially those you are negatively biased against. Try to walk in someone else's shoes to understand how the world looks through their eyes. This kind of connection with other people is the strongest weapon against bias.

4. Consciously build a circle of diversity

Get to know diverse people up close and personal. This makes it harder to generalise and stereotype. Do the following exercise to diagnose which homogeneous or diverse environment you are moving in. Based on your reflections, set up an action plan.

Circle of Trust Exercise*

On a piece of paper, list the names of six people you trust most who aren’t related to you. Now go through each of these criteria and put a mark next to a person’s name for each of the attributes below that they share with you:

- Gender
- Ethnicity
- Age (within about ten years)
- Sexual orientation
- Religious beliefs
- Nationality
- Native language
- Educational/ professional background

Reflection

Look at how many marks you have next to the names on your list. Do they indicate that you choose people in your life who are overwhelmingly similar to you, or did you find a solid diversity in your circle of trust? How might this affect your unconscious biases? Might it benefit you to have more variety of perspectives in your close circle?

* This exercise comes from: Annie Burdick: Unconcious Bias, Everything You Need to Know About Our Hidden Prejudices; see ressources.

5. Foster deep 1-on-1 relationships

Bias causes one thing to affect how the whole person is perceived.

Examples:

- Are you African American? Surely you sing beautifully and have a sense of rhythm.
- Are you a man? DIY must be your strength (and if it's not, you're not masculine).
- Are you a woman? Taking care of your children is your life's purpose (and if it's not, you just haven't discovered it yet).
- Are you Asian? Working after hours is normal for you.

The way out of this situation is to create individual relationships, contacts, and bonds with people you have unconscious biases against because of some selected characteristic. Getting to know them better, understanding their perspective, seeing them in different situations, dimensions and life situations will help you break free from one-dimensional bias. You will probably see how other these people are, and your bias is just a cognitive error, a simplification made by your brain.

6. Cultivate an attitude of curiosity

One way to work on your own bias is to activate curiosity. This state of mind allows you to let go of the 'I know it all' attitude. The goal of an attitude of curiosity is to understand the perspective and capabilities of each person, going beyond the characteristics associated with bias. Ask more open-ended questions, being careful to use a neutral tone, which will allow you to get to know the person better or understand the context of the situation. Stop your actions and switch to curiosity whenever you notice yourself getting into a defensive or judgmental attitude when interacting with people. It can be helpful to say out loud: 'that's interesting, tell me more about that'.

7. Openness to learning

Unlearning and re-learning is a core skill of an inclusive leader. It is also helpful in dealing with bias. Use your willingness to learn to help you overcome your own biases. Consciously learn from diverse people. Read books by leaders of different genders, ages and from other nationalities. Intentionally move out of a bubble of 'those who think alike' and face the arguments of 'those who think differently'.

DAY-TO-DAY SUPPORT

You may still have doubts about your own biases after reading the text and taking the IAT tests. Instead of looking for evidence of your own bias, use these moments as they arise. Think about who you don't like to listen to in your team. Use the criteria described in the 'circle of trust' exercise to analyse:

- Your team members
- Your leadership team
- People who have recently been promoted
- People who have recently been hired

Think about:

- What these individuals have in common.
- Who is conspicuously left out.

Questions to reflect on:

- What kind of biases do you have?
- What kinds of biases do you notice in your team? How do they manifest themselves?
- How might your biases impact relationships with your team and your organisational performance?
- What decision are you making to reduce the impact of biases on performance?
- What institutional changes can you make to reduce the impact of bias on your organisation and your work?
  Examples of institutional solutions include removing photos from resumés or coding names to hide a person's ethnicity.

As inclusive leaders, we need to be open to diversity and our biases. In chapter 3 '5 Development Areas of Leaders in the digital Age 5', the INCLUDE development areas 'Leader' and 'People' are explained in more detail and linked to the challenges of leaders. Tools that cover the area of 'Leader' generally serve to expand your perception. Tools covering the area of 'People' aim at perceiving the uniqueness of team members and their needs and listening to their different perspectives. Using these methods will support you in reducing the impact of biases in your collaboration. The tools of the INCLUDE development areas 'Processes' and 'Structures' support you in reducing the impact of discrimination on systemic exclusions in your organisation.

RESOURCES

Burdick, Annie (2021): Unconscious Bias. Everything You Need to Know About Our Hidden Prejudices; Summersdale.

Agarwal, Pragya (2020): Unravelling Unconscious Bias; Bloomsbury Sigma.

Banaji, Mahzarin R.; Greenwald, Anthony G. (2013): Blindspot. Hidden Biases of Good People; Delacorte Press.

Ross, Howard J. (2013): Reinventing Diversity. Transforming Organizational Community to Strengthen People, Purpose, and Performance; Rowman & Littlefield Publishers.

Kahneman, Daniel (2012): Thinking, Fast and Slow; Penguin Books Ltd.

Kahneman, Daniel; Sibony, Olivier; Sunstein, Cass R. (2021): Noise. A Flaw in Human Judgment; Little.

Harvard Implicit Association Test (IAT): https://implicit.harvard.edu/implicit/takeatest.html

Online Training: Implicit Bias Module Series:
https://kirwaninstitute.osu.edu/implicit-bias-training

#bias #unconsious bias #implicit bias #diversity #inclusion

22 Inclusive power and authority

‘Power is the ability to achieve purpose,
power is the ability to effect change,
and we need power.’
Martin Luther King Jr

Benefits

When is this tool useful?

- When you want to recognise the sources of your power and authority to lead teams inclusively.
- When you want to drive change in the organisation in a way that flows from team engagement.
- When you want team members to be proactive and act effectively to achieve goals.
- When you are looking for ways to unlock energy and potential within your team.
- When you encounter and want to fix negative attitudes in your team, such as learned helplessness, passivity, resistance, and an avoidance of responsibility.

From practice

Sandra was just promoted and became a team leader for the first time. She now leads the team where she previously worked as an expert. The point at which she took over the position was difficult for her. Sandra wanted to maintain good relationships with her colleagues but was afraid that if she were too close to them, they would abuse this close relationship and force her to make decisions she would not have made otherwise. She wanted to establish herself as a boss, build her authority as an effective leader, and show her supervisor that she was capable and had her own ideas about how to lead the team. She believed that power was shown through the pervasiveness and effectiveness of her influence, in other words whether things happened the way she wanted. Sandra believed that with the power of a leader, she could make things go faster and in a better direction than they had been in the team before her promotion. So she gathered the team and introduced them to her leadership approach. She began by saying which values she had as a team leader, what she appreciated when working with others, and what behaviour she would not tolerate in her team.

The aim of this meeting had been to be transparent about her actions in her new role and to make people feel more secure in knowing what to expect from her. However, the message caused consternation. They did not like Sandra's imposition of values and rules. They said she treated them as objects and didn't understand why she cut them off. Day after day, it only got worse. Whenever Sandra tried to learn more about the employees' tasks, the team perceived it as micromanagement. Sandra felt that her team's autonomy and independent actions were an attack on her authority.

One day, during a team meeting, a breakthrough occurred. During the meeting, the team was once again resistant. The participants raised many objections to the new reporting method that Sandra had proposed. It was supposed to give her better management information about what individuals were doing. Part of her just wanted to say, 'don't discuss; just do what I say'. Another aspect she observed was that the more she tried to convince people of the new form of reporting, the more people resisted.

She got the courage to stop discussing the reports and ask the team what was causing their reluctance. She heard from the team that her management style was draining their energy, and reducing their impact and their joy at work. They wanted to work with shared values, not just Sandra's values. They said they didn't like her dominant style. The leader thanked them for the information. It was bitter feedback for her. However, she started to think more deeply about what had happened in relation with her team. She concluded that by assuming her new position, she began to play the role of the boss, which she had observed many times in her environment. She realised that her decisions were driven by fear. She didn't feel confident in her new role; she was afraid of losing power and believed that if she handed over some control to the team, she would have less power and find that she was useless. She equated power with control. To her, giving up control meant giving up power. And, in her mind, that was an easy way to lose her own position. This reflection was Sandra's first step in redefining how she used power.

So she started again. This time, instead of an introductory presentation, she made a contract with the team that incorporated the team members' shared values and needs. Instead of focusing on control, she began thinking about how to facilitate the team's own authority and power. She learned how to conduct coaching sessions and get ideas out of the team during meetings. Instead of fighting arguments, she welcomed feedback. She worked on delegating appropriately. She learned to normalise the discomfort of uncertain outcomes and lack of control over everything. Sandra now has more humility and knows that she must constantly work and be careful about abusing power because the culture she grew up in is saturated with this failure. As she observes new positive results, her determination to break the cycle of domination and abusing power continues to grow.

In a nutshell

Power is a driver and the agent of change and growth. It can be used to exclude when built on domination and subordination, but it can also be used to include, leading to greater collaboration and transformation. Many leaders who want to become inclusive ask themselves: 'How to use power appropriately? If we give up decision-making and control, won't we become vulnerable and deprive ourselves of disempowered?'

This dilemma arises from the limited thinking that there are only two courses of action with regard to power: 'exercise power over someone' or 'succumb to power', in the former you win, in the latter you lose. This simplified treatment of the issue of power leads to a forced dichotomy: either you rule and dominate or you withdraw and do not use your power. But there are other ways of thinking about and using power, challenging the thinking that the world is divided into rulers and the ruled.

Power can be used in an inclusive way to engage the potential of all team members, and to release energy and motivation for action, creation and growth. This type of power positively impacts individuals, teams, and larger communities.

Four forms of power that leaders can use

Exercising **'power over'** someone is based on dominance and exclusion, which leads to a division of people into the powerful and the powerless, the dominant and the dominated. Power is attributed to people. This power is driven by fear. The leader who uses this approach focuses on controlling the individual.

'Power to': This approach is based on the belief that every person has the power to make a difference. Every person has the potential to develop. Leaders who follow this approach strive to create space for people's potential to unfold. **'Power to'** is understood as the potential that is unleashed in individuals and teams to change their reality and achieve goals. In contrast to 'power over', 'power to' is not statically bound to a position in an organisation.

Exercising **'power with'** each other takes place among equals. Power is shared, collaboration and relationship are at the heart of it. Unlike 'power over,' the end does not justify the means. Here the leader ensures that all stakeholders are involved in dialogue and decision-making.

The **'power within'** of every human being comes from self-esteem and the ability to act. It is what enables people to believe in something and find the strength to change themselves personally and their environment. It is the basis from which 'power to' and 'power with' can grow.

'Power to', 'power with', and 'power within' are inclusive forms of power. They lead to communities being built, others being empowered, and the inner growth of people and relationships. They make organisations lively, flexible, and dynamic rather than rigid and static. In this manual, you will learn how to use inclusive forms of power.

Four forms of power

Power over

Power to

Power with

Power within

INSTRUCTION

In the following content, you will be guided through a four-step process to help you reflect on your experience with power and develop a new way to deal with it.

Step 1

What do you consider to be the sources of a leader's power and authority? Write down your thoughts.

Step 2

Now read the following detailed description of the four forms of power that were briefly outlined above.

'Power over'

This form of power is equated with control of resources and decision-making capacity. 'Power over' is based on a dominance-subordination dynamic. In organisations, people are divided into those who have power and those who submit to it - the powerful and the powerless. The former take actions that influence the latter. This is a one-way street. The first group has privileges, and the needs of the second are secondary.

Power is a limited resource in 'power over'. Like sharing a cake, if someone gets a more significant piece, others will get a smaller one. People are predominantly instrumentalised; they are 'resources'. The important thing is to achieve goals; the means and style are secondary. Leaders and organisations that understand the power in this way strive for power to be static and hierarchical – assigned to positions in organisational structures.

With this definition of power, a lot of energy must be spent to maintain it. Since power is not static, power relations are dynamic and an expression of unequal relations in which those involved tend to fight to gain and then defend more power. Taking power means that it is taken away from another person. Someone wins, someone else loses. Someone has gained influence; someone has lost it – it is a zero-sum game. 'Power over' is driven by fear. In situations of failure, you have to find a scapegoat to take the blame. This is because failure is a threat to maintaining power.

'Power over' expresses itself in beliefs such as:

- If my people become too independent, I won't have a job to do.
- If my employee grows too much, they will replace me.
- When I stop carefully controlling everyt-hing, I lose power.
- I have to be careful / vigilant to protect my power from the attempts of people around me to take it.
- When the people around me become more influential, it worries me because it means that it has come at my expense.
- Relationships and reputation are meaningful, but in the end, it's the results that count.
- Sometimes there is no other way but by force.

The forms of this power are domination, controlling, motivation through fear, abuse, corruption, manipulation, discrimination, force, and coercion

Sources of leaders' power and authority. Examples of 'power over':

- Money / Budget
- Controlling resources
- Keeping information secret
- Holding a high position in a hierarchical structure
- Focusing on decision-making processes (bottleneck)

- Using force
- Managing by fear

The goal of an inclusive leader is to develop 'power with', 'power to' and 'power within' and to give up 'power over'. The goal is not to dominate others, but to activate their capacity to act and to create conditions for people, teams, organisations, and communities to emerge their existing potential.

'Power to'

This approach is based on the belief that every person has the power to make a difference and a potential that can be developed. Leaders who follow this approach strive to create space for people's potential to evolve. 'Power to' is understood as the potential that is unleashed in individuals and teams to change their reality and achieve goals. Power is understood here as fluid energy that accumulates within people and teams, and not as power statically bound to a position in an organisation.

Leaders who use 'power to' are focused on three processes. First, they invite teams to create a positive vision of change that will lead to a better future. The second step is creating new opportunities to make this vision a reality. The last step is to talk about potential, bring it to light, and develop it. These leaders unleash the vital power within an organisation that leads to growth, trust, and flourishing.

While leaders who focus on 'power over' see people's initiative and energy as threatening, leaders using 'power to' believe in the unique potential of people to shape their lives, their organisation, and the world around them. They treat people's personal energy and motivations as an ally, not an enemy. These leaders know that by nurturing the 'power to potential' in people, they are creating space for mutual support, collaboration and achieving goals. Leaders who want to develop 'power to' can take the following actions: exploring the interests and directions in which team members want to develop;

helping people to discover their strengths and unlocking potential; supporting them in achieving their goals through feedback.

'Power to' expresses itself in beliefs such as:

- People are inherently motivated to achieve goals that are important to them.
- Everyone has the power to make things happen.
- People have potential within themselves that they can multiply by acquiring new skills, knowledge or gaining self-awareness.
- Bottom-up engagement is desirable, not threatening.

Sources of leaders' power and authority. Examples of 'power to':

- Unlocking potential
- Fostering people
- Mobilisation
- Belief in the potential of people
- Commitment

'Power with'

'Power with' is the power that comes from collective action, the ability to engage stakeholders and mobilise communities for the common good. Such power is only possible when it is shared and considers the needs and interests of all participants. 'Power with' grows out of cooperation and relationships. It is based on respect, mutual support, solidarity, and shared decision-making. All those involved are equal. Dominance and control are replaced by creating conditions for collective action and the ability to work together.

When using 'power with', it is essential to create processes that accommodate diversity and differences of opinion and to seek common ground (e.g. around values and vision). The actions leaders can take focus on dialogue, reaching out to stakeholder needs, and building diversity-based teams (representation of different groups of origin, but also take care of the diversity of competencies, thinking styles, working styles, etc.).

Leaders who use 'power with' to build alliances for desired change are excellent negotiators.

'Power with' expresses itself in beliefs such as:

- Diversity is a strength.
- Value means changing the world in a direction that works better for everyone.
- Power is an infinite resource. When you stop holding it and start sharing it, there is more energy and motivation for action.
- Sustainable change requires engaging and including all stakeholders.
- While people may disagree on specific solution proposals, there is value in dialogue, and there are solutions (perhaps yet to be discovered) that will allow us to consider the needs of all parties better.
- Considering everyone's needs and showing respect for all parties makes more people committed to change. Change is brought about by everyone's energy together, not by domination.
- The minority can impact the majority if they speak with one voice.

Sources of leaders' power and authority. Examples of 'power with':

- Solidarity
- Sharing
- Diversity
- Including
- Dialogue
- Networking
- Sense of belonging
- Commitment

'Power within'

The inherent power that each individual has within them is related to their self-esteem. This inner power is based on accepting their differences and showing respect for the diversity and distinctiveness of others. This internal power provides empowerment and hope, allowing them to be resilient and to rebound from failures. An important aspect

back

of inner strength is self-awareness and critical thinking, which will enable them to constantly question and challenge assumptions made or imposed from the outside.

By developing inner power, people become aware of their capabilities and potential. Internal power is the foundation from which 'power to' and 'power with' can grow. It gives confidence that reality can be shaped in the desired direction. Creativity, art, and spirituality are means to affirm people's 'power within'.

Leaders who use this power focus on working on their resources and energy: starting with physical well-being, managing emotions and mental abilities, and developing self-awareness and spirituality (understood as values, higher self, transcending self). They resonate with their attitude to others and help people build self-esteem, reaching the creative forces inherent in every person. The primary instrument of a leader drawing from the 'power within' is developing own and the team's self-awareness.

'Power within' expresses itself in beliefs such as:

- The dignity of every human being is the most important value.
- Every individual has a creative power within them.
- Gaining self-awareness is a crucial way to grow.
- Strong self-esteem among team members is a strength, not a threat.
- People can heal themselves and recover from difficult experiences and failures.

Sources of leaders' power and authority. Examples of 'power within':

- Dignity
- Life position 'I am OK.'
- Courage
- Resilience
- Self-awareness
- Positive experiences and skills to make failures lessons learned
- Acting

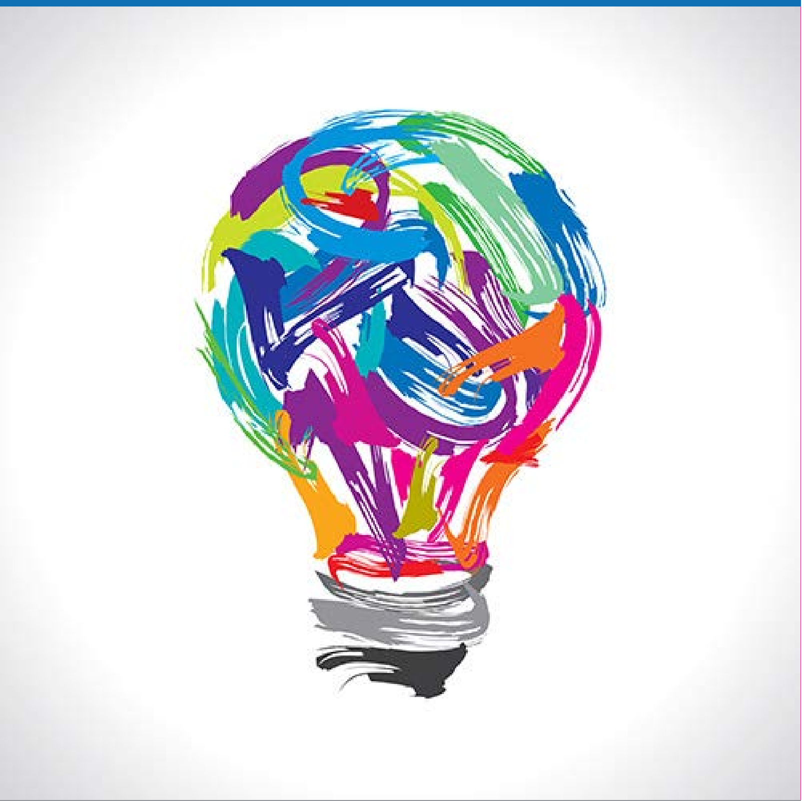
Step 3

Now take your notes on the sources of power and authority of leaders that you compiled in the first step.

- Which form of power matches the sources of power you listed best?
- Which of the four approaches comes closest to your understanding of power?

Reflect on how you deal with power.

- Where and when do you feel yourself to be powerful?
- Where and when do you think yourself powerless?
- What form/s of power do you use in your leadership practice?
- Which form/s of power do you want to promote in your practice?



Step 4

Take the result from Step 3: 'What form/s of power do you want to foster in your practice?' and develop further at using 'power with', 'power to' or ' power within' - depending on where you want to put your focus.

You can practise every day. Use your experience and previous knowledge in this process, particularly focussing on new activities and on those that you want to give up. The tools in this manual will help you to develop the necessary competences, structures and processes.

If you want to deal with **'power within'**, we recommend the tools 'life positions'; 'drama triangle'; 'inner drivers', 'unconscious bias' and 'NAIKAN method', among others.

If you want to work on **'power to'**, you can apply the tools 'fuckup nights', 'giving getting feedback', 'leader as a coach', 'inclusive dialogue', 'delegation board', 'drama triangle', 'golden circle' and 'peer consultation', among others.

back

If you want to develop **'power with'**, you can start working with the methods 'beta codex', 'cell structure design', 'open space for organisations', 'consent decision-making', 'consultative individual decision', 'team canvas', 'scrum', 'inclusive dialogue, 'intercultural competences' and 'team contract', among others.

DAY-TO-DAY SUPPORT

People interested in inclusive leadership realise that 'power over' is not the way to develop or advance an inclusive leadership style. A common misconception they succumb to is that there are only the two courses of action: 'exercising power over someone' or 'succumbing to power'. This pattern of thinking was addressed in the overview at the beginning of this tool description. Leaders who do not define power more broadly give up a large part of their actual potential to act. Those who only exercise 'power over' deprive their team of security and consciously accept that team members feel let down.

By using inclusive forms of power as described in this tool, leaders change the ways they influence. However, without building up the 'power within', it is not easy to follow this path authentically and successfully. A first and important task for leaders is to work on their self-awareness and self-esteem. The 'power within' is the basis for the 'power to' and the 'power with'.

The way power is exercised has much to do with past experiences. Through personal experience and observation, leaders learn what power is, how it is expressed, and how it is used. Leaders who want to change their understanding of power in a more inclusive direction need to be aware of the patterns they hold and do not want to reproduce in order to break the intergenerational reproduction of an outdated understanding of power.

Questions for further reflection:

- What forms of power did you experience in your youth? Write down examples.
- What forms of power do you currently experience?
- How have your previous and present experiences shaped your understanding of power?
- What patterns do you want to break?

RESOURCES

The distinction between 'power over' and 'power with' was made by the social scientist and management consultant Mary Parker Follett, who lived from 1868 to 1933.

Just Associates (2006): Making Change Happen: Power. Concepts for Revisioning Power for Justice, Equality and Peace; free download here:
https://justassociates.org/wp-content/uploads/2020/08/mch3_2011_final_0.pdf

Hunjan, Raji; Keophilavong, Soumountha (2010): Power and Making Change Happen; Carnegie UK Trust; free download here:
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https://justassociates.org/all-resources/a-new-weave-of-power-people-politics-the-action-guide-for-advocacy-and-citizen-participation/

Internet: Understanding power for social change: https://www.powercube.net/

#power #authority #empowerment

23 Delegation Board

'If you want to do justice to your role as a leader, you need the sense to delegate tasks to the right people and enough self-discipline to not meddle with their work.'
Theodore Roosevelt

Benefits

When is this method useful?

- When you want to help the development of a team that can organise itself.
- When you want to delegate responsibility without overstretching your team, and at the same time ensuring that your team members are not given too few challenging or motivating tasks.
- When you want to make it possible for your colleagues to grow at a speed that is right for all participants regarding the topic of self-organisation.
- When you want to support autonomous and independent action in your team.
- When you want there to be no blame shifting or excuses when there are failures or challenges.

From practice

Victor hat vor kurzem an einer Fortbildung Victor recently took part in a training course about 'Dealing with Responsibility'. The trainer asked the participants to form pairs during one of the exercises. She gave each pair two long Mikado sticks and asked them to face each other with the sticks balanced on the index finger of their right and left hands respectively so that the two people held the sticks parallel between them, balanced in the air, allowing them to move backwards and forwards around the room.

Each pair chose a person A and a person B. In the first round, person A was tasked with being responsible for balancing the stick. In the second round, person B took on this responsibility. In the third round, both people shared the responsibility.

For Victor, it was a new experience to see how it felt to share or delegate responsibility. It was different to what he was used to as a leader, but it worked. One key realisation for him was he found the third round where they shared responsibility to be less strenuous, more enjoyable, and left him with a more positive feeling.

Victor shared the insights that he had gained from this exercise with his workplace. He realised that until now he had accepted sole responsibility for the 'sticks' in his team. Until now he had been convinced that it was down to his efforts if the team were to achieve its team goals. The new insights were invaluable for Victor. He wanted to find a way to share more responsibility with his team. Amongst other things, the trainer introduced the tool delegation board. Victor would now like to try this out at his workplace.

During the initial training on how to use the delegation board Victor realised that he had previously been leading his team in a very directive way. He 'sells' most of the tasks to his team after deciding by himself which tasks need to be done. It wasn't uncommon for his team to respond to this with open resistance – although even more often they responded with 'hidden' resistance. The result of his reflection on his previous leadership style was painful for Victor. He realised that he had previously assumed that his team members were afraid of accepting responsibility. He had to now admit that he was actually the one who was most afraid of losing control.

Victor conducted a team meeting where his team members could use delegation board cards to give feedback on how they believed the various tasks should be distributed amongst the team. Victor and his team were able to reassign around 40 percent of the tasks in this way, meaning that the team – or individual team members – immediately assumed complete responsibility for these tasks. This noticeably alleviated Victor's own workload.

Victor was now faced with a new responsibility. What should he do with the time he had now gained since his team had taken on more responsibility? He was sometimes even afraid of being useless. Victor decided to work together with a coach to redefine his role. He had to first work through his fears in detail that some of the team members might not be sufficiently skilled to take on responsibility for the new tasks. Through a period of reflection with his coach, he learned that his team members might not meet the agreed goals in the way that he would have done himself, but that there are often several acceptable ways of doing this. He also realised that every team member's sense of individual responsibility increased once he stopped micromanaging them and instead allowed them to have greater autonomy.

In a nutshell

Misunderstandings and conflicts often arise between leaders and team members because it has not been defined clearly enough the extent to which the freedom to make decisions, the provision of stipulations, or mutual coordination is present or required in different situations.

If you want your team to accept more responsibility you need to delegate responsibility for decisions and achieving goals in a way that everyone can understand. Your team members will then make decisions within the parameters that have been previously decided upon and are allowed to make their own mistakes.

Delegation in the sense of delegation board does not mean handing over tasks and goals to other people, only for you to then supervise it later. This approach is typical of traditional top-down management. Delegating responsibility in the sense of delegation board means handing over responsibility for the final result and encouraging employees to act independently. You can reach this goal if you determine the levels of delegation together with your team.

The first decision is the extent to which responsibility will be taken on. Delegation does not all or nothing, in other words either you supervise everything, or you delegate completely. You can delegate in a differentiated way. By choosing a level of delegation that fits the people and the situation you will increase your team's involvement, foster their growth, and free up their resources – both for you and for your team members.

The delegation board makes it possible for you to decide on the appropriate level of delegation so that you can consider both the skill and maturity of the leader and the team members, as well as the complexity of the tasks and the business environment.

With the delegation board you can visualise the delegation of tasks in a way that everyone can understand. This is done by differentiating between seven levels of delegation, from direct instructions through to the highest level of handing over control, where a leader is no longer involved at all. The nearer your team gets to this seventh level, the further they are on their journey towards becoming a truly self-organised team.

Delegation Board

	Tell	Sell	Consult	Agree	Advise	Inquire	Delegate
Positioning our organisational unit			Team Leader Victor				
Further developing our range of products and services			Team Leader Victor				
Offers up to 5,000 Euros					Elena		
Offers over 5,000 Euros			Team Leader Victor				
Select suppliers				Team with Team Leader Victor			
Select cooperation partners				Team with Team Leader Victor			
Selection of marketing channels		Team Leader Victor					
Specify working hours				Team with Team Leader Victor			
Facilitating team meetings							'All team members rotating without Victor
Holiday planning				Team with Team Leader Victor			
Selecting new employees		Team Leader Victor					
Appoint project teams			Team Leader Victor				
Participate in professional trainings				Team			
etc.							

INSTRUCTIONS

The seven levels of delegation

There are interim steps between control and unlimited trust. Delegation board differentiates between seven levels of delegation. These steps help leaders who struggle to hand over control to structure the process of 'letting go'. At the same time, team members who previously had to or wanted to shoulder littler to no responsibility are impelled to accomplish more for the whole team.

1. **Tell**	You make a decision and share it with your team. You do not want or need a discussion. As a leader, you may perhaps explain the reasons for your decision.
2. **Sell**	You make a decision but try to convince your team that your choice was correct.
3. **Consult**	Your consult your team's opinion and take this into account before making a decision.
4. **Agree**	You discuss the decision-making situation with all participants and arrive at a mutual consensus. Your vote counts for just as must as anyone else's.

5. Advise	The individual(s) that have been given responsibility for making the decision ask you for your opinion as a leader. They then decide on their own, however.
6. Inquire	You entrust the decision to one or more people, or to your entire team. You then simply ask about the reasons for making the decision or ask the one making the decision to convince you.
7. Delegate	You entrust the decision to your team or to an authorised individual. You are not interested in the details of making the decision and do not want to be informed about it.

In levels 1 to 3 the responsibility for making the decision lies with the leader. In level 4 everyone is equally involved in the decision. In levels 5 to 7 the team or individual team members assume the decision-making responsibility. On the delegation board you can easily recognise visually the extent to which the responsibility for the decision moves away from the leader on the right to the team or the team members on the left.

How should you use the delegation board?

Start by answering the following question: why do you want to use the delegation board? There are various appropriate ways of putting it to use. Several of the following aspects usually come together.

- You want to clearly define the relationship between you and your team members that you are delegating tasks to.
- You want to determine the responsibilities within your team from scratch.
- You want to define the boundaries of individual team members' responsibility.
- You are not sure of the extent to which your team or individual team members are able and willing to take on real responsibility. You therefore need a flexible and easily adjustable tool.
- You would like to lighten your own workload and / or that of some of your team members.

Create a list with the decisions and tasks that you would like to assign the responsibility for together with your team and with the help of the delegation board (left-hand column). Do bear in mind that in the form displayed here you as a leader are the only one with the power to decide which decisions and tasks should be regulated by the delegation board and which should not. You could also decide, however, to pick the individual decisions and tasks together with your team members. This is particularly well suited to teams that already have a certain level of maturity and experience at managing themselves.

Keep a written record of what exactly should be decided for each individual decision or task. This makes it clear for all participants what is implied in the brief description in the left-hand column of your delegation board. These explanations also make it easier to integrate new team members. It is particularly important to clearly define what a task entails in organisations where most decisions have been made by the leader. This is the only way to ensure that your team members have a thorough overview of the consequences of each of the decisions. This will equip your team members to play a competent role in discussing how responsibility should be redistributed. If you create the list of decisions and tasks together with your team, then you can

use the discussion about the various positions to ensure that everyone understands the specific tasks in the same way. In this instance the results should also be recorded in writing so that everyone can understand them.

Finish by creating a list with the names of everyone who can or should take on responsibility. This list will include the names of all team members, you as a leader, individual clearly defined roles within the team, or the entire team (with or without the leader).

Organise a team meeting and ensure that all team members can attend. Good opportunities to start working with the delegation board are the integration of new team members or the start of a new project. If you are already convinced that the delegation board is a useful tool then you shouldn't wait for one of these opportunities, however.

Explain to everyone in the team what the delegation board is and why you have decided to suggest that the team should work with this tool. Focus on showing the advantages that using the delegation board would have for your team, for each individual team member, and for you as a leader.

Explain the seven levels of delegation and how they are different from each other. Think about some examples that are easy to understand and have a link to your daily work in the team. You could also use the resources that we recommend below, including an explanatory video.

Together with your team, you now need to determine an appropriate level of delegation for each decision or task in the left-hand column of the delegation board. It works best if you prepare a flipchart with post-it notes for this. If you are conducting the meeting online, then there are tools such as Miro (see resources below) that work well for this. The decision-making process will then go as follows:

- All participants will state which level of delegation they think is appropriate.
- You will discuss the arguments that speak for or against the suggested level of delegation and try to reach an agreement.
- If you cannot reach a consensus, then you as a leader have the decisive vote.

The results should be depicted in a way that they can be easily accessed both physically and virtually by all participants.

Delegation Poker

An alternative way to decide on the right level of delegation is the game delegation poker. The game adds some dynamism and fun to the process, but it mainly offers a quick way to find out how the team views the allocation of responsibilities. All participants must choose their preferred level of delegation for a decision or task. This should be done without the influence of anyone else's choice or arguments. This reveals interesting similarities and differences in the way tasks and goals are perceived and offers a foundation for valuable discussion and better decisions.

How do you play delegation poker?

1. Introduce the delegation tool to your work as described in the instructions above.
2. Once you have the reached the point where you can determine the right level of delegation for the individual decisions or tasks, distribute seven cards* with the different levels of delegation to each of the participants.
3. Go through each individual decision or task in turn with your team. Explain again briefly what is special about each decision or task and ask all participants to decide which level of delegation they would prefer.
4. Everyone votes at the same time by simultaneously revealing the card that they have chosen.
5. Ask the people with the highest and lowest levels of delegation about the reasons for their choice.
6. If there are differences of opinion, discuss them as a team and find the right level together as described in the instructions above.
7. Repeat this approach for each of the decisions in the left-hand column of your delegation board.

* You can easily make the cards for delegation poker yourself. You can also buy the game or download the cards for free from the internet and cut them out yourself, however (see resources below). If you would like to create the cards yourself then the following information should be on the cards:

Level 1: Tell – I will tell them

Level 2: Sell – I will try and sell it to them

Level 3: Consult – I will consult and then decide

Level 4: Agree – We will agree together

Level 5: Advise - They will decide, but I will advise in advance

Level 6: Inquire - They will decide, and I will ask about it afterwards

Level 7: Delegate - They will decide autonomously

DAY-TO-DAY SUPPORT

Transparency and adaptability

The delegation board is a flexible tool that is easy to adapt. There will be times when you and your team will realise that a level of delegation that was chosen in advance for good reasons is not turning out to be appropriate in practice. In such an instance it is easy to simply shift the level of delegation to the right or to the left. Make it your regular practice to review the levels of delegation together with your team. The arrival of new members to the team is a particularly good opportunity to reflect on previously assigned levels of delegation. This will give your new team members a good impression of how topics such as individual responsibility and self-organisation are treated in your team. Each adaptation also offers your team and you as a leader the chance to hand over greater autonomy, responsibility, and room for self-organisation to your team. The more practice your team has, the easier and more promising it will become to move the level of delegation further to the right. If you would like to use the delegation board as an inclusive leader, then it should never be static. You and your team will then use the tool regularly as a transparent instrument on the way towards even greater team autonomy.

Visibility

Only if the delegation board is available to everyone without restrictions, will all team members and you as a leader be able to act accordingly in your daily work. It is good practice to present the agreed results in a way that is as easily visible as possible. This should be both physical (a printout on every desk, in the break room, in the kitchen, at reception, by the copier etc.) and virtual (a link to an online drive that is referenced before every meeting, for example). It is important that all participants are aware of the respective level of delegation before they begin a task that is determined by the delegation board.

Using the levels of delegation for communication

Not every decision can be planned in advance, and not every action needs to be determined with the help of the delegation board. It should be your goal to use the delegation board when finding an arrangement for important and frequently occurring decisions or tasks. This will keep the board clear. There will also be daily decisions in varying situations, however, that you cannot plan for. You can still use the logic of the delegation board for these too, however.

The following examples are some suggestions for how you and your team can implement the characteristics of the various levels of delegation in your daily communication with each other:

- I want to ask your opinion about this before I decide (level 3).
- What we need to do is non-negotiable (level 1). We just need to accept this. We can agree together on how we would like to handle this task, however (level 4).
- I'm happy to delegate the decision to you, but I would like to meet with you afterwards to find out why you made the decision that you did (level 6).
- Whatever happens, I will support the solution that you suggest – even if I would have done it differently myself (level 7).
- I would like you to find a solution. My task will be to support you in this. The final decision is yours, however (level 5).

Making decisions and shouldering responsibility – alone or together?

The ability to make decisions is one of the primary aspects that is traditionally associated with a leader's tasks. In traditional organisations, leaders should, want to, and must make decisions. Making decisions and taking responsibility for the consequences of these decisions is a central characteristic of leadership.

Talk with your team about the challenges that accompany responsibility. In the digital age, the pressure to make decisions even when you as a leader are unsure yourself has increased. Draw attention to these challenges within your team. Decisions must often be made despite feelings of insecurity and concerns. You cannot have a complete awareness and assessment of everything, and yet you must sometimes still make fast decisions. Talk about your experiences and make clear how and why you have made decisions in the past and which positive or negative consequences your decisions had. By focussing on decisions and responsibility in your team you are laying the foundation for all participants to be better prepared for future decisions.

Leaders who would like to spread responsibility across several shoulders can introduce this approach well by using the exercise with the Mikado sticks that was outlined in the real-life story above. If all participants experience first-hand how much more satisfying

and successful it is to shoulder responsibility together, then this offers a good foundation for working in the direction of an INCLUDE organisation.

Credibility and power

As a leader who introduces delegation board you will be under the particular scrutiny of your team members. Everyone will pay very close attention to whether you are actually prepared to hand over the competences you have assigned to the team. As much as possible, keep to the agreements that have been made and only intervene if an acute emergency response is required. Don't take the chance away from your team to learn from failures and mistakes. Intervening too early can signalise that you are not ready to actually give up your decision-making ability. Your credibility will generally not suffer, however, if you take specific events as an opportunity to discuss with your team whether the previous level of delegation continues to be appropriate.

By using the delegation board, you are saying that you are ready as a leader to give up power. Dealing with this in practice is not easy for most leaders or for many team members. Both sides typically come from a working environment that is marked by top-down relationships (family, school, education, work experience etc.). Giving up or taking on power is something that needs to be practices and it important to actively grapple with the challenges entailed by this.

A helpful gateway to this topic is the realisation that power does not mean superiority or inferiority. Anyone who deals with the topic of power in a differentiated way is better prepared as both a leader and a team member to constructively implement the agreements made with the delegation board. You can find out more information about the topic of power and authority when it comes to inclusive leadership in the tool 'inclusive power and authority in this chapter.

Delegation board as a learning tool for greater self-organisation

The delegation board is a useful transition instrument or even learning tool for many organisations to practice an alternative way of handling responsibility as a team. The advantage is that the process can be shaped in a way that is structured and transparent for everyone with the help of the delegation board. Both sides – leaders who want to forego direct influence, and employees who have previously not been used to dealing with a greater degree of responsibility – are not overwhelmed.

Delegation board in combination with further INCLUDE tools

Alongside training in the delegation tool, we recommend that leaders who want to develop into INCLUDE leaders read two further tools in this chapter that offer a more in-depth introduction to the topics of individual responsibility, autonomy, and decision-making ability: 'beta codex' and 'cell structure design'. Amongst other things, you will find suggestions in these tools that will help you with one disadvantage of the delegation board. The delegation boards offer little help when you want to conduct work across teams or when you would like to coordinate work across departments better. This tool is primarily directed at improving the cooperation within a team and between the team and the leader. This internal focus can lead to a silo mentality that may already exist in your organisation becoming even more entrenched. INCLUDE leaders should actively work against this trend. If you would like to make the responsibilities in your entire organisation more inclusive, then you will find valuable suggestions in 'beta codex' and 'cell structure design'.

Two further innovative ways of making decisions are also introduced in detail in this handbook: 'consent decision-making' and 'consultative individual decision'. 'Consent decision-making' offers an interesting alternative to the requirement for reaching an agreement by consensus in level 4 of the delegation board. 'Consent decisions' are generally reserved for particularly important decisions. You should think about whether you would also like to test this decision-making method. 'Consultative individual decision', by contrast, principally offers a more differentiated version of level 5 (consult). Not only is the leader asked for advice, but also a circle of consultants who should be consulted before a final decision is made. This enables higher quality decisions, especially when an organisation's internal experts are also consulted. You can usefully combine both 'consent decision-making' and 'consultative individual decision' with the delegation board.

RESOURCES

Jurgen Appelo made delegation board popular in his management 3.0 approach.

Video: How to Delegate Better with the 7 Delegation Levels:
https://www.youtube.com/watch?v=VZF-G7MCSG4

Video: How to play Delegation Poker:
https://www.youtube.com/watch?v=BRBR3SOzu6M&t=14s

Online templates for working with the Delegation Board and for Delegation Poker can be found at Miro:
https://miro.com/app/board/o9J_laQYqRs=/?fromEmbed=1 and https://miro.com/miroverse/delegation-poker/.

Delegation Poker cards are available in 17 languages. Go to:
https://management30.com/practice/delegation-poker/ to buy them or download them free of charge in a digital version (personal data required).

#responsibility #delegation board #delegation poker

#autonomy #self-organisation #decision #decision-making process #agile

24 Inclusive Dialogue

‘The strength of the team is each individual member.
The strength of each member is the team.‘
Phil Jackson

Benefits

When is the art of dialogue especially useful?

- → When you want to address a conflict with individuals or within a team in a solution-oriented way.
- → When conflicts arise and you want to identify solutions that take the organisation's underlying conditions and the needs of those involved into account.
- → When you want to hear everyone's opinion, thereby enabling you to include different points of view when developing a solution.
- → When you want to encourage openness to creative approaches, ideas, and different opinions.
- → When you want to give objective feedback, even if those you are addressing see the situation differently.
- → When you want to make your behaviour transparent for other team members and strengthen mutual trust within the team.

From practice

Paula found Noah to be a challenging team member. As a team leader, it was difficult for her to involve Noah in organisational changes. Their discussions were like a battle. Noah always found a 'but' in their discussions.

After these conversations, Paula was always very exhausted. She labelled Noah a problematic team member. She wished that working together would be easier and wanted him to do what she said at least once without discussion. She decided: it can't go on like this. She analysed the course of their conversations and realised that she wanted Noah to follow her ideas. At the same time, she wanted to be perceived as a friendly, listening leader. She kept inviting Noah to pseudo-dialogues - conversations where she appeared to listen and then ended up pushing her ideas through. She was not willing to resign and reconsider her views. She wanted to influence, but she did not want to be influenced.

When she realised this, she resolved to listen carefully in the next conversation with Noah. She did not want to go into the dialogue with a preconceived idea of how the conversation would go, nor did she want to argue. Paula was positively surprised at how the change in her attitude to the conversation influenced its course. The conversation was calmer than usual and very solution-oriented.

Paula admitted that she had treated Noah as a problematic colleague and had not listened to the important points raised in his objections. Noah no longer felt powerless when with his team leader. His motivation increased because he saw that his voice was heard and taken into account.

In a nutshell

Inclusive dialogue can happen when you enter a conversation with a willingness to rethink or change your beliefs, attitudes or ideas based on what the other person says.

In an inclusive dialogue, we talk to each other and influence and inspire each other. This form of exchange is an essential tool of inclusive leadership, since everyone's voice is heard and considered when working together.

Many leaders fear that their colleagues will not respond to pressing needs if they give the team full opportunity to express themselves. However, an honest and open dialogue takes the perspectives of all participants into account.

The inclusive dialogue presented below consists of seven steps. If you take these steps into account, you will create a setting in which you listen to each other, consider the context in which you are working, and jointly search for a solution that benefits everyone involved.

The seven steps of inclusive dialogue*

Step 1
Clearly state the goal of the conversation and the underlying conditions

Step 2
Ask your interlocutor for their point of view

Step 3
Paraphrase what you have heard

Step 4
Share your perspective

Step 5
Interlocutor's response to your perspective

Step 6
Try to find a win-win solution

Step 7
Summarise the findings

* Source: Bielińska, Inga; Jakubczyńska, Zofia (2018): "Jeden na jeden. Odważne rozmowy z pracownikami. Dialogi i praktyczne ćwiczenia"; MT Biznes.

INSTRUCTIONS

Follow the seven steps of inclusive communication in your conversation.

Step 1: Clearly state the goal of the conversation and the underlying conditions that affect your work

If you clearly define the goal of the conversation beforehand, this will help you stay on topic and not get lost in digressions. In addition, you create an atmosphere of emotional security for your interlocutor.

- 'I want to talk to you about X ...'
- 'I want to discuss with you Y ...'
- 'Let's talk about the development of Z ...'

Refer to the agreed rules or underlying conditions that you are operating with.

- 'We both have agreed ...'
- 'According to our team's rules ...'
- 'The underlying conditions according to which we work are ...'
- 'While we are exploring different approaches and looking for solutions, I want us to respect the framework by which we work in our organisation. This includes our values, principles, and agreements.'

Step 2: Ask your interlocutor for their point of view

Make sure that your interlocutor is the first to have the opportunity to present his or her point of view. Try to understand the person you are talking to before you want to be understood. If your interlocutor has had the opportunity to tell you everything they wanted to say, this increases the chance that they will listen to you attentively.

- 'How does this look from your perspective?'
- 'How do you see it?'
- 'Would you please share your impressions'.

Listen carefully to your interlocutor and remember the keywords they use.

Step 3: Paraphrase what you have heard

- 'Let me repeat what I have heard so that we can be sure that I understand you well ...'
- 'I have heard that ...'
- 'So, from your perspective ...'

When you paraphrase a statement, check that you have captured it well.

- 'Is there anything I missed?'

Step 4: Share your perspective

Use personalised language and be careful not to polemicise the arguments of your interlocutors.

- 'I will tell you how it looks from my perspective ...'
- 'Let me tell you how it looks from my side ...'

Step 5: Interlocutor's response to your perspective

Now invite your interlocutor to speak again, referring to what you have said.

Ask your interlocutor:

- 'What do you think about it?'
- 'How did you hear it?'

Step 6: Try to find a win-win solution

Look for a solution that is mutually beneficial and considers the interests of both parties.

Ask your interlocutor to also answer the following questions:

- „What solutions take into account important needs from both parties?“
- “How can we work together while taking into account what is important to you and me?“
- “What can we do differently next time?”

Step 7: Summarise the findings

Finally, summarise the findings so that it is clear to both parties what the outcome of the conversation is and what the way ahead will be.

- ‘What are we agreeing on from now?’
- ‘What action plan will we adopt?’
- ‘When will we start implementing the agreed changes?’

Questions to ask yourself before an inclusive dialogue

Before you enter into dialogue with your interlocutor, answer the following questions:

- What is the purpose of the dialogue?
- What do you want to achieve through this dialogue?
- Why are the seven steps of inclusive dialogue a good way to communicate in this case?
- To what extent are you open to changing your approach under the influence of what you will hear during the conversation?
- What could increase your openness to change your attitude? Concentrate on your approach, not the characteristics of your interlocutor.

Avoid the following mistakes when conducting the inclusive dialogue

Exchanging arguments instead of sharing your perspective

When you hear and paraphrase your interlocutor's needs and then proceed to share your perspective, you may be tempted to contradict what your interlocutor has said. This may cause the person you are speaking with to listen to you not because they want to understand, but simply to defend themselves. Instead, tell them in neutral language how you view the situation from your perspective. You can then talk about where the differences arise. If your interlocutor interrupts you, ask them to listen to you and make sure there is time to talk about the differences afterwards.

Make sure you have enough time

Some leaders who are particularly concerned about efficiency set very narrow topics for discussion. If the interlocutor wants to bring up other important issues, they tell them that this is not the purpose of the meeting. If this happens often, it can lead to colleagues withdrawing and becoming frustrated because there is no opportunity to express themselves to the leader. Make sure that you have enough time for conversations where colleagues can say anything that is important to them.

But you didn't talk about it

The moment you paraphrase a statement, your interlocutor hears their words from a different perspective. This may cause them to want to change their statement: 'That's not what I meant'. Or they may want to add a new aspect that they did not mention before. Leaders who like to reason can refer to logical communication and say: 'Why didn't you say this before?' or 'Why didn't you talk about this?'. Remember that this is not a competition to evaluate your paraphrasing skills, but a way of communicating and understanding the essence of what you want to express. If a colleague wants to change a statement, this proves that the inclusive dialogue approach works.

Understanding the need behind the expectation

When listening to a colleague, pay attention to what they expect. However, don't just stop there. Try to understand what essential needs and interests they want to satisfy with this expectation.

If it is not clear to you, ask directly:

- 'Why do you care so much about it?'
- 'Why is it important to you?'
- 'What is it supposed to guarantee?'

Without a deeper understanding of the expectation and the need behind the expectation, there can only be a 0-1 solution or a winner-loser solution: Either you meet the expectation, or you do not meet the expectation. However, the greater the understanding of the overall situation and the knowledge of the interests and needs behind the expectation, the greater the chances of finding a win-win solution.

For example, if your colleague is expecting a promotion, try to find out what need she wants to satisfy with the promotion: Appreciation, recognition, development, security, prestige? If you identify the need, you will find other ways to fulfil the colleague's need. Even if you are not able to meet the request for a promotion, the conversation can end satisfactorily for the colleague because you can offer alternatives that meet her basic need.

Remember the framework you are working within

If you conduct inclusive dialogue according to the seven steps, you run the risk of focusing too much on the wishes and ideas of the people involved, including your own. It is important to consider the framework in which you operate at an early stage in the conversation. In organisations, people must behave according to certain guidelines. Placing compliance with these guidelines as the sole responsibility of the facilitator is not in line with the INCLUDE approach. With INCLUDE, it is important to us that everyone develops a perspective on and responsibility for the overall picture. As a leader, outline at the beginning of the conversation the underlying conditions that the solution needs to fulfil to work in your organisation. Make sure that you have the same understanding here.

back

RESOURCES

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Stelter, Reinhard (2018): The Art of Dialogue in Coaching. Towards Transformative Exchange; Routledge.

Kashtan, Miki (2015): Reweaving Our Human Fabric. Working Together to Create a Nonviolent Future; Fearless Heart Publications.

#dialogue #inclusive dialogue

#communication #neeeds #contract #ok-ok

25 Peer Consultation

'You never win alone. The day you believe anything else is the day you start losing.'
Mika Häkkinen

Benefits

When is peer consultation useful?

- → When you want the team to be more self-driven to create positive change.
- → When you want to increase confidence in your competence within the team.
- → When you want to strengthen your teamwork and sense of connection within a team and in the way that team members support each other.
- → When you want to foster proactive attitudes.
- → When you want to increase the effectiveness of team cooperation.
- → When you want to involve the team in solution processes.

From practice

Hannah noticed that the employees in her team have lively discussions with each other in workshops and develop shared solutions for problems. In internal meetings, however, they act less constructively, tend to focus only on problems, and respond to Hannah's proposed solutions with objections aimed to contradict the effectiveness of her suggestions.

These less than constructive approaches to challenges in the team cost Hannah a lot of energy. She therefore started looking for a method to free herself from the responsibility for finding a solution and to instead encourage and help the team in their responsibility for finding shared solutions for the problems faced by individual employees. She stumbled upon the method 'peer consultation' and decided to try it out.

Hannah organised a meeting with five employees and explained the method and the procedure to them. She told her employees about the current challenge facing her and that she hoped to find inspiration to solve. Hannah was delighted to see her employees actively introducing their ideas and trying to keep to the prescribed structure of the 'peer consultation' method – even when the eagerness of certain employees meant that they didn't always succeed. Hannah knew, however, that this would be set right with a little more practice. After an intense discussion, Hannah told the employees that she now has an idea of how to approach the problem and shared the next steps with them.

By the end, everyone involved had the feeling that they had constructively contributed together to a solution for Hannah's challenge. In addition, everyone was able to use the skills and information that they had gained from the meeting for their own challenges. They were excited about this team experience and decided to regularly use the 'peer consultation' method in their meetings.

In a nutshell

Peer consultation is a form of support in which one colleague discusses a current challenge or problem with one or more other colleagues. This method fosters positive change within the team by sharing experiences and working together to find solutions. This support method unlocks resources and creates a sense of empowerment within the team.

There are different ways to introduce peer consultation in the team. Meetings can be cyclical or ad hoc. A maximum of 40 minutes is usually sufficient to give and receive new inspiration or ideas and to identify resources for ways to deal with the challenge.

During peer consultation, one person presents a current challenge. Colleagues ask in-depth questions, give feedback, and share their experiences and opinions.

The colleague's task is not to suggest solutions, but to be guided by the question: 'What would I do if I were in that situation?'

The person who presented the challenge chooses the best option for themselves. They can follow what they have heard or develop a new idea inspired by the team.

This approach is enriching for everyone involved, as everyone is inspired by what they hear and their sense of individual responsibility and ability to solve problems are strengthened.

The key to the effectiveness of peer consultation is to follow its structure. The facilitator has the crucial role of keeping an eye on the time and structure of the meeting, as well as responding to disruptions. The facilitator should not comment or suggest solutions.

The four steps of group consultation

Presenting the problem

Exploring the problem and redefining it

Exchanging experiences and generating solutions

Choosing a solution

INSTRUCTIONS

Framework conditions

There are three different roles in peer consultation.

- Case Provider
- Counselling Peers
- Facilitator

During peer consultation, the person providing the case presents their challenge to the consulting peers. The counselling peers ask questions to broaden or deepen their perspective and to share their own experiences without imposing solutions.

The facilitator's task is to keep the process running smoothly and to ensure that the rules are adhered to. Their role is process-oriented and content-neutral.

You can apply this method with a team size of 4-8 people, but there is a greater mutual learning effect with a group size of 6-8 people.

After you have decided together which colleague will present their case, follow the instructions below step by step.

Step-by-step instructions

Step 1: Presenting the problem (5 minutes)

The provider of the case ...

- briefly and comprehensibly describes the challenging situation to their colleagues.
- addresses an open question to their colleagues and writes it down.

Step 2: Exploring the problem and redefining it (10 minutes)

Ask questions to broaden and deepen the perspective (8 minutes)

Feedback and reflection (2 minutes)

Counselling peers ...

- ask open questions to broaden and deepen their perspective.
- focus their questions more on the case provider than on collecting facts and figures for their own understanding. The questions have more of a coaching character.

The provider of the case ...

- notes down the questions of the colleagues. They do not answer the questions.
- asks colleagues to slow down if the pace is too fast for them, for example by raising their hand.
- tells colleagues which questions they found helpful.

Facilitator ...

- Asks the provider of the case if they would like to redefine the challenge.

Step 3: Exchanging experiences and generating solutions (15 minutes)

Counselling colleagues ...

- share their own experiences in a similar situation. These do not have to be about exactly the same problem.
  - What worked?
  - What did not work?
  - Remember: this is about sharing, not giving advice.

The provider of the case ...

- does not comment.
- is silent.

Step 4: Choosing a solution (5 minutes)

The provider of the case answers the following questions ...

- What did I hear?
- What was helpful for me?
- Did something inspire me? If so, what?
- What will I try to apply?

All participants summarise their new insights in a final round and thank their colleagues for their contributions and the time invested.

DAY-TO-DAY SUPPORT

How should you choose a subject for peer consultation?

- Ask the participants who is currently facing a challenge and would like to bring it into the peer consultation.
- Gather a list of topics from the group.
- Choose the first topic that interests the most participants.

How should you facilitate?

- 'Be process-oriented – content neutral'. Do not comment on the quality of the contributions; keep an eye on the rules and time.
- Explain to the participants that time is short but there is enough to find inspiration and suitable solutions.
- Use a timer with sound so that participants know when the time is up.

Most common mistakes

- The problem is not clearly specified.
- The facilitator allows the provider of the case to answer questions directly.
- Participants make suggestions on what the provider of the case should do.
- Participants exceed the time limit set for the specific parts. This leads to fatigue and decreasing commitment and involvement of the participants in the process. If this happens, the provider of the case may experience that his or her case is hopeless.

As a facilitator, how to prevent the most common mistakes?

No clearly specified problem.	• Explain that the participants do not need to know everything about the matter at hand, just the outlined context of the problem. • Ask the provider of the case about their perspective: 'What is difficult for you in this situation?'; 'What is the challenge for you?'.

Allowing the provider of the case to answer questions directly.	• Point out at the beginning of step 2 of 'peer consultation' that the provider of the case tends to answer questions directly. Encourage the person to write down the questions and reflect on the answers. • Ask the provider of the case if they want someone else to write down the questions so they can focus on their content. • If the pace of the questions is too fast, the provider of the case may ask you to slow down. Agree on a sign for this. • Make sure that participants do not ask leading questions: 'don't you think it would be good to …' • Ask the counselling peers not to ask questions that are not relevant to the provider of the case. These especially includes questions about detailed information that do not bring any new insights.
Counselling peers suggest what the provider of the case should do.	• Explain to participants why it is essential that they speak from their perspective. Point out that the aim is to inspire the provider of the case to choose the solution best suited to their situation and personality. • Ask them to use 'I statements'. • Respond when you hear suggestions referring to an established principle and sound more like advice.
Exceeding the time limit set for the specific parts. This leads to fatigue and decreasing commitment and involvement of the participants in the process. If this happens, the provider of the case may experience that his or her case is hopeless.	• Agree with the group that you will interrupt individuals if they exceed the time limit. Tell them that this is not for personal reasons. • Announce the approaching deadline by saying, for example, 'We have time for one last question; who wants to ask it?'; 'We have 5 minutes left before finishing.' • Take a break after the end of the peer consultation. This will allow participants to share additional inspiration in informal conversations. • Discussions that are too long and the feeling that the topic is not fully discussed may be due to the problem being too broadly defined.

RESOURCES

There are various approaches and authors that deal with 'peer consultation'. This method is often applied in working contexts of education and re-socialisation.

Bowman, Sharon L. (2008): Training from the Back of the Room! 65 Ways to Step Aside and Let Them Learn; Pfeiffer.

Department of Education (2019): PSDP – Resources and Tools: Intervision model of peer-led group reflection: https://practice-supervisors.rip.org.uk/wp-content/uploads/2019/11/Intervision-model-of-peer-led-group-reflection.pdf

#peer consultation #group intervision

26 Intercultural Competences

'It is not our differences that divide us.
It is our inability to recognise, accept,
and celebrate those differences.'
Audre Lorde

Benefits

When is this tool useful?

- When you are looking for approaches to constructively deal with cultural diversity.
- When you want to increase diversity in your team and prepare yourself to work with people from different cultural backgrounds.
- When you work in an international context, or are preparing yourself and your team to work in an international context.
- When you want to deal constructively with challenges that arise when working with people from different cultural backgrounds.
- When you want to work in a country whose culture is different from your own cultural background.

From practice

For the last three years Maja has been leading a charity that supports refugees. Her team advises people about legal questions, helps them with administrative challenges, and accompanies them when visiting doctors. The team has also recently started organising personal sponsorships that help refugees to learn the language, amongst other things. The charity team is helped in their work by several volunteers who enthusiastically contribute to the charity's welcoming culture.

The charity's services are available to all refugees in the region, regardless of whether they are from Afghanistan, Syria, Ukraine, or other countries. Maja has noticed for a while now that not only her team but also the volunteers have preferences for certain countries and have a somewhat critical attitude towards other countries. This has an impact on their work, especially when it comes to sponsorships, which are all about personally spending a lot of time with each other. For refugees from certain countries, it can even be difficult to find a sponsor or someone to help.

Maja knows that this isn't due to lack of willingness to help, but amongst other things to a lack of knowledge about certain cultures, missing information, or unconscious prejudices. She addresses the topic and the challenges that it entails at a team meeting. Her colleagues are concerned that there is a noticeable aversion to certain nations amongst the volunteers and even amongst themselves within the team. They dive immediately into a brainstorming session about how they can work on this and can also take their important voluntary colleagues with them on this journey of learning.

At the end of an intense meeting, they arrive at a decision: everyone involved should learn more about other cultures and get to know the people from these cultures better – on a very personal level. They would like to clearly display their welcoming culture in their region.

They start with a series of workshops to develop both their own intercultural competences and those of the volunteers. In addition to this, they plan public events where the different cultures can introduce their traditions, cuisine, art, or literature and personally interact. An exchange of life stories was particularly popular and once again granted a new perspective on other cultures.

The goal is to arouse curiosity and support mutual appreciation. Information and personal interactions are there to foster openness and to break down unconscious prejudices. After this series of events, a deeper understanding about the cultural backgrounds of all refugees grew, as well as a trust and empathy towards people from countries that they were once sceptical about. In addition to this, the events proved to be a superb opportunity to galvanise the support of older people in the region who had previously struggled with loneliness. This creative approach and hearty involvement therefore led to two challenges being successfully overcome.

In a nutshell

In brief, intercultural competence (IC) is the ability to work effectively with people from different cultural back-grounds. It sounds simple - as if you only need to acquire one more skill. But intercultural competence involves more than this. It means bringing together a set of attitudes, knowledge and social skills that enable you to go beyond the limiting filters of your own culture, so that encounters with other cultures is not seen as a threat but as an opportunity for growth amongst people, the team, and the organisation.

Intercultural competence requires:

- **A self-awareness of one's cultural background**, understood as a set of shared values, accepted norms, beliefs and stereotypes and their impact on interactions with those perceived to be different.
- **An attitude of cultural relativism** when dealing with representatives of other cultures.
- **The ability to apply knowledge of cultural differences when interacting with other people**.

A self-awareness of one's cultural background

No person has access to objective reality. We perceive the world through our cognitive filters shaped by the cultural background, values, norms and beliefs that we share with people ingrained in the same culture. Our filters are impacted by the times in which we were born (our generation), our family, the significant people who surrounded us while growing up (teachers, friendships), gender identity, ethnicity, social group, majority or minority group membership, religion, region (taking into account not only geographic differences, but also whether they are urban or rural), the kind of education we benefited from, the groups, organisations, and associations to which we belonged, social experiences (including contact with other cultures, or lack of them), career paths, and our successes and failures in life that shaped our identity. Intercultural competence requires self-reflection on your back-ground and understanding how it affects interactions with people from other cultural circles.

An attitude of cultural relativism

Cognitive filters mentioned above are like contact lenses, so light and comfort-able that you may not know or forget that you are wearing them. Especially if you live in a culturally homogeneous country. People without cross-cultural awareness think that 'their world' is the right one and that the others are wrong. Their values are correct, and others are wrong. Their culture is better, and others are worse. If we were asked to draw a map of the world, the countries we live in would probably be in the centre. For most people, looking at a world map created by inhabitants of other continents evokes strange feelings. Putting your own culture at the centre and the rest of the world on the periphery is the essence of ethnocentrism. Ethnocentrism is an attitude expressed in the belief that your own culture is the point of reference when describing and evaluating the cultures of other groups. With such ballast, it is easy to have unconscious biases and condescending ways of communicating

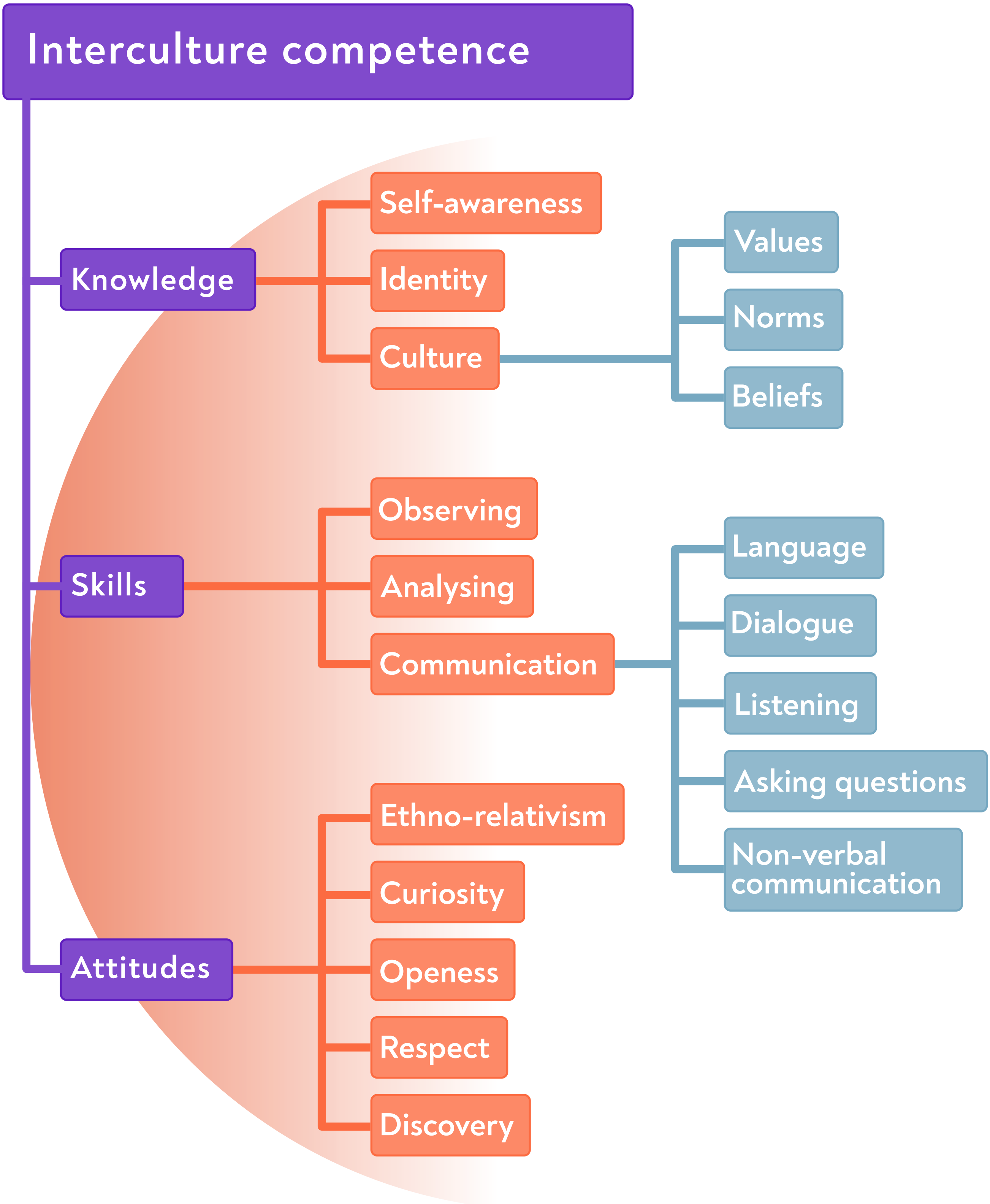
DIVERSITY

with representatives of different cultures. The opposite of ethnocentrism is cultural relativism. Cultural relativism is noticing and accepting the diversity and distinctiveness of other cultures and of refusing to judge. This attitude leads to understanding the ways of acting, thinking, and experiencing the world of people from other cultural backgrounds about their values, meanings, and specific rules. Cultural relativism requires an attitude of openness, curiosity, respect, and discovery, which equates to a tolerance for ambiguity.

The ability to apply knowledge of cultural differences when interacting with other people

It is important to remember that the people we work with are shaped by their cultures. When working with people from different cultural backgrounds, it is good to explore and address cultural differences. This way, misunderstandings are avoided. We probably do not fully identify ourselves with the mainstream image of our cultural circle and should also take this into account when dealing with others. For this reason, we should interact with those around us on a personal level. In order not to fall into stereotypes, intercultural competence requires the following skills amongst others: active listening, observing, analysing, the empathy to understand the other person's perspective, and adjusting communication style to facilitate better understanding.

Knowledge, skills, and attitudes that make up interculture competence*



* Own illustration based on https://www.monash.edu/arts/monash-intercultural-lab/about-the-monash-intercultural-lab/what-is-intercultural-competence.

INSTRUCTIONS

If you want to further develop your intercultural competence you can find six fields below that you should take a closer look at.

- Develop a stronger intercultural self-awareness
- Develop an intercultural attitude
- Check your intercultural competence
- Get to know the cultures you are working with better
- Adapt your communication style
- Keep on developing your intercultural skills

1. Develop a stronger intercultural self-awareness

Answer the following questions by thinking about how each criterion influenced your cultural background.

Nationality: What country did you grow up in? What is your nationality? Did you or your family have experiences of emigration? If so, what was the reason for this? How did it affect your cultural background? To what extent do you share national values?

Region of origin: Where did you grow up? How culturally diverse was this area? How did this region differ from the culture of the rest of the country where you grew up? Do you still live in that place? How did the other places you lived in influence your cultural background?

Family: What was the model of the family you grew up in? What values and principles are held in your family? To what extent are you loyal to these values today? What family values have you left behind? What other values have you adopted in your life? What had an impact on this?

Significant adults: Who were the important people during your childhood and adolescence who influenced your worldview? (E.g., relatives, teachers, coaches, neighbours, etc.). What values did they pass on to you? How did they influence who you are today?

Customs: Was your family ethnically diverse? How many languages did you speak at home? What holidays did you celebrate? How did you celebrate them? How did you spend your leisure time? What foods did you eat? Which of these customs have you kept? How have these customs influenced you?

Generation: What generation do you represent? What is distinctive about your generation? What generational experiences shaped your worldview? To what extent are you true to that worldview today?

Community: To what extent was the community in which you grew up ethnically and linguistically homogeneous? How wide-ranging are your experiences of interacting with people with different ethnic backgrounds to your own? How many communities do you identify with?

Groups: What groups, organisations, and associations have you previously belonged to? How have these experiences affected your worldview? Which values have you kept, and which have you let go of?

Work: What value was placed on work in your environment? How important was a career in your family? Did professional roles differ by gender? What professions and occupations were valued? What beliefs about money and wealth did you bring from home? How true are you today to your beliefs about work from your family home?

Other factors: What other significant factors influenced your cultural background? In what ways? What distinguishes your cultural background from the people you edge around?

Has your understanding of your cultural background broadened, or do you have a better insight into your cultural background? What makes up your cultural background? How does it affect your contacts with people from other cultural backgrounds?

2. Develop an intercultural attitude

An attitude characteristic of cross-cultural contacts is ethnorelativism. You can find out how this is for you by examining your level of intercultural sensitivity.

Examine your intercultural sensitivity

People use different cognitive strategies to deal with the intercultural differences they experience. Milton Bennett described six stages of increasing sensitivity to intercultural differences with the 'Developmental Model of Intercultural Sensitivity' (DMIS). The model represents a continuum from the simplest to more cognitively complex ways of perceiving other cultures. The more sophisticated the strategy, the higher the intercultural competence is. The development of intercultural competence goes through six stages. The first three stages are ethnocentric. One's own culture remains the centre of reality. The following three stages are ethnorelativistic, allowing one to experience one's culture in the context of other cultures.

Six stages of increasing intercultural sensitivity according to Bennet*

Ethnorelative perspective	**Integration**	• Ease of transition between different cultural perspectives • Lack of central self-definition by cultural dimension
	Adaptation	• Expanding your own worldview to thoroughly understand other cultures • Behaving in culturally diverse ways • Striving to understand across cultural divides • Being able to act appropriately outside your culture

Ethnorelative perspective	**Acceptance**	• Experiencing your own culture as one of many worldviews • Accepting and similarities and differences • Awareness of how culture influences human experience • Curiosity about other cultures • Pursuing learning, a deeper understanding of multiculturalism
Ethnocentric perspective	**Minimization**	• Noticing similarities dominates over noticing differences • Emphasizing your tolerance. Often seeing oneself as a person with strong intercultural competence. • At the same time, minimizing differences results in different perspectives not being heard and considered • Thinking that mere awareness of basic communication patterns is sufficient with assured cooperation. While assuming that these basic behavioural criteria are absolute when meanwhile they flow from one's own culture.
	Defence	• Your own culture is seen as superior • Use of stereotypes • Dualistic thinking (us vs. them) • Treating cultural differences as a threat • Other perspectives cause discomfort
	Denial	• Failure to see other cultures • Looking at cultures in a simplistic way • Lack of interest in other cultures • Ignoring other perspectives • This stage often results from social or physical isolation. This results in the views of the dominant culture never being challenged.

What level of intercultural sensitivity according to Milton Bennett are you at?
How do you observe yourself? To get a better perspective, ask your colleagues how they perceive you in terms of cultural sensitivity.

* Own illustration based on the approach of Milton Bennet. See also Apedaile, Sarah; Schill, Lenina (2008): Critical Incidents for Intercultural Communication; for more information see 'Resources' section.

Developing intercultural sensitivity

If you want to develop your intercultural sensitivity, you will find suggestions for the different phases below:

- **Denial** phase: Develop an awareness of the differences between cultures.
- **Defence** phase: Work on being less polarising and negative, focus instead on similarities between cultures.
- **Minimization** phase: Focus on being more aware of cross-cultural differences.
- **Acceptance** phase: Take the time to explore and investigate other cultures.
- **Adaptation** phase: Develop empathy for other cultures.

Intercultural competence requires the ability to cope in an uncertain, multicultural environment. It is a myth to believe that mastering this skill ensures communication without difficulties with people from a different cultural background. Moreover, focusing on avoiding challenges can lead to superficial, uncritical interactions. In this case, it is difficult to add value to cross-cultural cooperation.

Therefore, the attitude with which one interacts with another person is crucial. Openness, curiosity, respect, and discovery will allow you to successfully navigate in an unfamiliar world and maintain contact and dialogue even when misunderstandings or conflicts arise.

This attitude is characteristic not only of intercultural competence but also of inclusive leadership. To develop a relational attitude, we recommend reading the detailed tips in our INCLUDE tools ‘unconscious bias’ and ‘leader as a coach’.

3. Check your intercultural competence

Most of us are not aware of our cognitive filters imposed by culture. We are so immersed in it that we take many things for granted. We notice in others that their behaviour flows from their cultural background, while we consider our behaviour normal. This process is called naturalisation and makes it difficult for us to realise our biases, making it challenging to partner with people from other cultural backgrounds.

In the tool 'unconscious bias' in this chapter you will find more information on this topic as well as a reference to a test you can use to find out which biases might influence your interactions with people from other cultures.

Various tests offer the possibility of analysing personal intercultural competence. The instruments cover different dimensions of intercultural competence. This could be a good start to developing in this area. Here are some of the tests:

BEVI

Beliefs, Events, and Values Inventory (BEVI) instrument measures how beliefs and values influence learning, relationships, and life goals. The instrument is used in the context of education, leadership, and well-being.
www.thebevi.com

CCAI™

Cross-Cultural Adaptability Inventory™ (CCAI) facilitates the identification of an individual or group's strengths and weaknesses in four skill areas fundamental to effective cross-cultural communication and interaction: emotional resilience, flexibility / openness, perceptual acuity, and personal autonomy.
www.ccaiassess.com

IDI

Intercultural Development Inventory (IDI) is a psychometric instrument which assesses personal development and self-awareness, audience analysis, organisational assessment and development, and data-based intercultural training.
www.idiinventory.com

The World Prism™ Profiler

The World Prism™ Profiler is a profiling tool that allows you to identify your dominant cultural orientations and compare them to the country, colleague or even the team of your choice.
http://www.birdwell.fr/en/world-prismtm-profiler

ICAPS

The intercultural adjustment potential scale (ICAPS) is a survey that measures cross-cultural adaptability. It evaluates how well people will adjust to life in a new culture and the degree to which they will be able to adapt to living, working, and travelling effectively in a new or different cultural environment.
http://www.ichangeworld.com/icaps.html

DCA

Diversity Competencies Assessment™ (DCA) is a self-assessment tool for strengths and areas for development in the field of diversity.
https://www.diversityinclusioncenter.com/learning-tools/di-instruments/#dca

You can find more instruments here:

https://www.digi-pass.eu/how-to-measure-intercultural-competence

4. Get to know the cultures you are working with better

Wanting to understand the cultures of different countries better, you can use the 6-D Model© created by Geert Hofstede. Based on years of cross-cultural research, Hofstede distinguishes six dimensions of culture. These are power distance, individualism / collectivism, masculinity / femininity, uncertainty avoidance, long-term orientation / short-term orientation, and indulgence / restraint.[1]

The definitions of these dimensions below have been quoted from Hofstede: https://www.hofstede-insights.com

Power distance describes the power relations in a culture and how power is distributed. It is about the question 'How much inequality

[1] Hofstede's six dimensions have been much discussed internationally. The INCLUDE project team sees the added value of this approach in the fact that different social imprints can be clearly named. It therefore provides a starting point for a discussion about cultural differences, e.g. in international teams. However, care should be taken when using the approach so that these six dimensions do not become the basis of new or entrenched cultural stereotypes (please refer to the tool 'unconscious bias').

ought and can be between people?'. High power distance means that decisions are made from the top down. If the power distance is lower, then the culture is more participatory.

Individualism / collectivism is the degree of interdependence a society maintains among its members. It is related to whether people´s self-image is defined in terms of 'I' or 'we'. In individualistic societies, people are supposed to look after themselves and their direct family. In collectivistic cultures, people belong to groups that take care of them in exchange for loyalty.

Masculinity indicates that society is driven by competition, achievement, and success. Success is defined by the winner / best in the field – a value system that starts in school and continues throughout organisational life. A low score on this dimension **(femininity)** means that the dominant values in society are caring for others and quality of life. A feminine society is one where the quality of life is the sign of success and standing out from the crowd is not admirable. The fundamental issue here is what motivates people, wanting to be the best (masculine) or liking what you do (feminine). Masculine societies are oriented around competition, whereas feminine societies are oriented more around relationships and cooperation. In masculine cultures, gender roles are also clearly defined, whereas in feminine cultures they can be exchanged more easily.

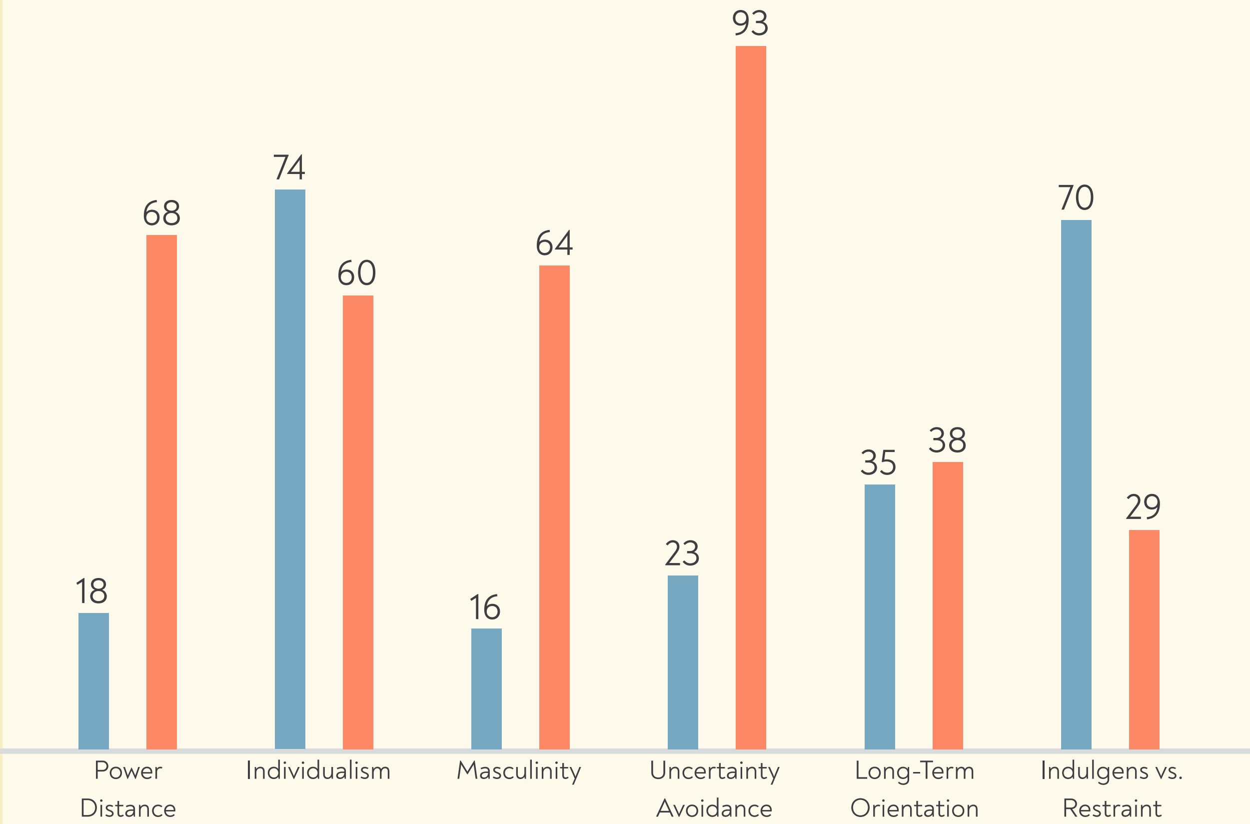
Uncertainty avoidance has to do with how a society deals with the fact that the future can never be known: should we try to control it or just let it happen? This ambiguity brings anxiety, and cultures have learned to deal with it in different ways. The extent to which the members of a culture feel threatened by ambiguous or unknown situations and have created beliefs and institutions that try to avoid these is reflected in the score on uncertainty avoidance.

Long-term or **short-term orientation** describes whether a culture tends to plan and think in the long term or whether it can be characterised more by short-term thinking and action or spontaneity. In long-term oriented cultures, the focus is on building personal relationships or networks of relationships, respect for superiors, older people, and traditions. In shorter-term cultures, on the other hand, the focus is on making a quick profit and taking pride in being able to adapt quickly to changing situations.

Indulgence vs. **restraint** describes the way people in a culture control their desires and impulses. This dimension provides information about the extent to which a culture accepts the self-realisation of each individual. In a culture with a high value, marginalised groups or people who do not conform to 'the average' are also accepted. Individual freedom is an important value there. This is not the case in 'controlled' cultures, where stricter regulations apply.

The comparison software allows you to compare national cultures on the basis of the six dimensions mentioned above: https://www.hofstede-insights.com/country-comparison/

An example comparison of two cultures according to Hofstede: Denmark and Poland



The graph shows a low score for Denmark in **power distance** (18). This implies that many people in Denmark experience relatively flat hierarchies and a largely partnership-based relationship with superiors in their working lives. The autonomy of team members is likely to be highly valued. In comparison, Poland shows a much higher rating (68). In practice, this is likely to mean, among other things, that there are higher expectations for 'power holders' and that much of the responsibility rests on them.

When people who are used to these different ways of working work together, challenges can arise. These could be, for example, in delegating tasks, taking responsibility, and deciding how much autonomy is expected when working in a team or in general interactions between team members and the leader. One approach to leadership might be perceived as too 'soft' and powerless, the other too autocratic, directive or distanced.

A clear difference can also be observed in **masculinity** and **femininity**: Denmark (16) and Poland (64). This leads to the conclusion that for many people in Denmark, quality of life and caring for each other are of high importance, and that for many people in Poland, competition as well as performance and success play an important role in working life. These attitudes could, among other things, be a source of different motivation in transnational teams.

back

The graph shows another difference in **uncertainty avoidance**: Denmark (23) and Poland (93). From these values we can conclude that many people in Denmark are used to working in flexible systems where short-term changes may be the order of the day. We can assume that for many people in Poland rules and norms are relatively important in their context at work and that new or unorthodox approaches and ideas might cause uncertainty. In the cooperation of people who are used to these different ways of working, challenges can arise, among others with regard to the need for security, trust or self-organisation.

Comparing countries is not about evaluating which way of working is better or worse. This approach would simply increase tensions in intercultural teams. The aim is to develop an awareness of differences, to deal with them actively, and to develop mutual understanding - without judging. The next step is to commonly develop a procedure and rules that are suitable for everyone.

Compare the culture of your country with that of another country. What do they have in common and what are the differences? Where do you find similarities? What contrasts could influence the cooperation? What is worth discussing and what areas of cooperation should be contractually regulated in order to work well together?

Keep in mind: to some extent, all of us are shaped by the culture we grew up in. But our individual background, life choices and personality also play a big role. Perhaps your culture values great power distance, but you behave in an atypical way and prefer a cooperative way of leadership. The above principles characterise the prevailing culture in a country and cannot be easily transferred to your or your colleagues' values.

Find out how your personal attitudes differ from national perceptions. Ask for feedback from colleagues from other cultures.

5. Adapt your communication style

Andy Molinsky, researcher and practitioner of cross-cultural communication, explains cross-cultural differences through differences in communication style, boiling them down to 6 significant dimensions.[2]

Directness: How you're expected to straightforwardly communicate in a particular situation. Are you expected to say exactly what you want to say or to 'hint' at something in a more indirect manner?

Enthusiasm: How much emotion and engagement you are expected to show when communicating. Can you express how you feel, or is it more appropriate to hide positive feelings?

Formality: The amount of deference and respect you are expected to display with your communication style. Are you expected to show a high level of respect of communicating with someone in a particular situation, or can you be more informal?

Assertiveness: How strongly you are expected or allowed to voice your opinion and advocate your point of view in a particular culture. Should you be forthright in expressing yourself or work at hiding or sublimating your point of view?

Self-promotion: The extent to which you can speak positively about yourself. Should you actively promote your positive qualifications or be more reserved?

Personal disclosure: The extent to which it is appropriate to reveal personal information about yourself to others. Should you be open and forward in expressing details about your life, or is it more relevant to hide these personal details?

The strength of this model is its practicality and simplicity. To match communication styles, you need to observe both the other culture and your personal preferences for communication. In this way, it is possible to identify when communication is within the comfort zone. This refers to when cultural expectations and personal preferences match to some extent or to where a gap appears. Once you have identified the communication gap, you should approach your counterpart or their culture in baby steps in the way and style that is acceptable to you.

Two examples: in your culture, self-promotion is not condoned. You are coming to the US where this trait is desirable. You can look for a new way to talk about your competences in a positive light. You could mention past work successes or qualifications related to the setting of the communication in a conversation, so that this information also helps your work together and is not only about self-promotion.

If you meet a culture where disclosure of personal information matters but it is a personal transgression for you to talk about your private life, you can consider what information is acceptable for you to share. If you do not want to talk about your family situation, you can disclose information about your hobbies.

[2] The description of the criteria is based on Andy Molinsky: Global Dexterity; for further information see 'Resources' section.

6. Keep on developing your intercultural skills

Even if you are already well informed about cultural and ethnic differences, unexpected situations can always arise. The key to good intercultural communication is to avoid assumptions. In practice, this means asking questions before drawing conclusions.

Intercultural competence requires skills such as attentive listening, curious questioning, careful observation, thorough analysis, open communication, good language skills, active dialogue skills and sensitivity to non-verbal communication.

To strengthen these competencies, use other INCLUDE tools in this chapter: 'inclusive dialogue', 'giving getting feedback', and 'leader as a coach'.

DAY-TO-DAY SUPPORT

By developing an inclusive leadership approach, you are simultaneously developing your intercultural competence. This is long-life learning rather than just another skill. It requires constant attentiveness and humility.

When working with colleagues who have grown up in a culture other than yours, information about these cultures can give you an orientation for working together. However, you cannot draw concrete conclusions from this general information about specific working relationships with colleagues since this information is only a part of these individuals. Moreover, it is also possible that the colleagues belong to a minority culture of a country.

Furthermore, it is important to consider that a person's identity is multidimensional and that the influence of a culture does not explain the entirety of human behaviour and choices. The models mentioned above are not intended to promote stereotypical thinking, but rather to raise awareness of cultural differences.

Your attitude (respect, curiosity, openness, spirit of discovery, ethnorelativism) and personal skills (listening, observing, analysing, communicating) are essentially what matters when working with people from other cultural backgrounds, rather than your factual knowledge of cultural particularities.

RESOURCES

Recommendations:

Bennett, Milton (1986): A developmental approach to training for intercultural sensitivity; International Journal of Intercultural Relations; 10 (2); p. 179-196: https://www.researchgate.net/publication/223565305_A_developmental_approach_to_training_for_intercultural_sensitivity.

Apedaile, Sarah; Schill, Lenina (2008): Critical Incidents for Intercultural Communication. An Interactive Tool for Developing Awareness, Knowledge, and Skills. Facilitator and Activity Guide; NorQuest College: https://www.norquest.ca/NorquestCollege/media/pdf/about/resources/intercultural-resources-for-educators/critical-incidents-for-intercultural-communication-toolkit.pdf

Molinsky, Andy (2013): Global Dexterity. How to Adapt Your Behavior Across Cultures without Losing Yourself in the Process; Harvard Business Review Press.

Hofstede, Geert; Hofstede, Gert Jan; Minkov, Michael (2010): Cultures and Organizations - Software of the Mind. Intercultural Cooperation and Its Importance for Survival; McGraw-Hill Education.

Matveev, Alex (2018): Intercultural Competence in Organizations. A Guide for Leaders, Educators and Team Players; Springer.

Internet: EU-Projekt Digipass: https://www.digi-pass.eu/how-to-measure-intercultural-competence

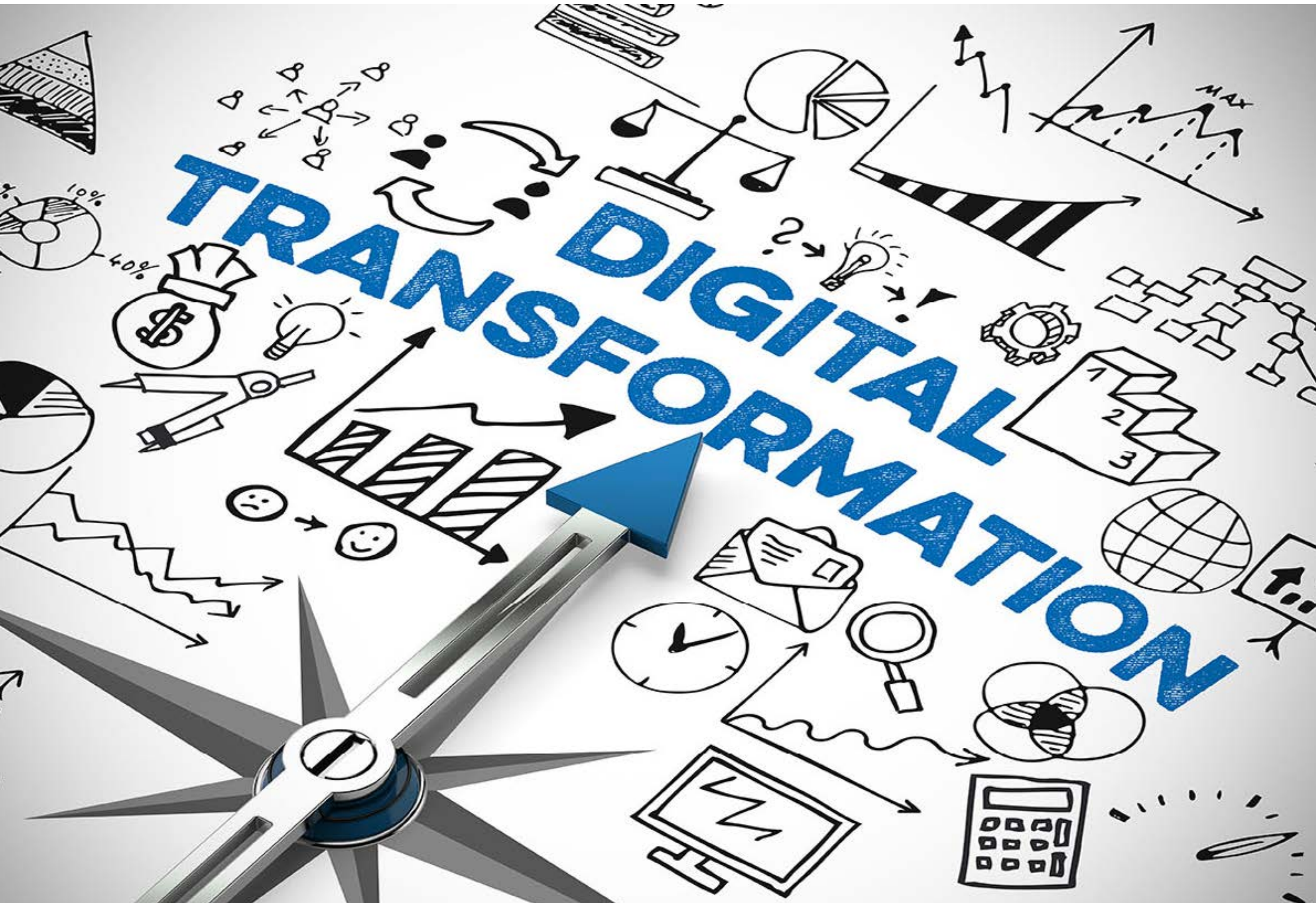
Internet: GLOBE-Project: https://globeproject.com/results/countries/POL?menu=country#country

Video: TED Talk, Chimamanda Ngozi, The danger of a single story: https://www.ted.com/talks/chimamanda_ngozi_adichie_the_danger_of_a_single_story/transcript

#culture #diversity differences #bias #stereotypes #communication

27 Digital Transformation Tool

'At least 40% of all businesses will die in the next 10 years if they don't figure out how to change their entire company to accommodate new technologies.'
John Chambers



Benefits

When is this tool useful?

- When you want to be able to evaluate the effects of digital transformation on your organisation or company.
- When you want to be more aware of the opportunities and risks of digital transformation and want to realise the potential of digital applications.
- When you want to be led systematically through the process of developing a strategy for the digital transformation of your organisation.
- When you want to be able to facilitate the process of digital transformation in your organisation.
- When you want to broaden your management expertise and leadership skills in the area of digital transformation.
- When you need practical instructions for the digital transformation of your organisation that you and your team will be able to implement directly 'on the job'.

From the practice

Thomas is the manager of a seminar centre in a rural region in the centre of Germany. Since it was founded in 1995, the seminar centre has specialised in the topic of sustainable development and environmental protection. Part of the service they offer is professional accommodation and catering.

The seminar centre has over 40 employees and offers a place for learning, exchanging, and discussing ideas, particularly in topics linked to a sustainable future. It also provides the opportunity for a countryside break, far removed from the daily hustle and bustle of the city. Its unique location in the countryside, coupled with the fact that it is close to a large city, means that visitors can enjoy both peace and good accessibility.

Thomas has believed for some time that the seminar centre should be more open to the digital world than it has been in the past. Up until now, however, his team have not seen why this would be necessary, especially since the seminar centre has several loyal customers, including both school groups and companies who use the rooms for internal workshops.

Two years ago, Thomas began to delve into the INCLUDE approach. Together with his team it was decided that the seminar centre would run through the INCLUDE process of development. During this process, it became clear, amongst other things, how little those involved had previously known about the opportunities and risks of digital technologies. Both the interest and the willingness of the team to engage in the digital world increased.

Then, when various coronavirus lockdowns meant that the seminar and accommodation aspects of the business had to be completely shut down on several occasions, it became clear to everyone that the business should be at least partially adjusted to the digital world. An emergency support programme from the government meant that the seminar centre and the 40 jobs could be saved despite the closures caused by the coronavirus. It was clear to everyone involved, however, that they would have come through the pandemic better if they had expanded their services earlier to include digital components.

Together as a team they decided that Thomas and another colleague from the area 'Training for sustainable development' should take part in a certified online training course that would train both to become digital managers*. The costs for

* This training course really does exist. You can find out more about it at www.emcra.eu.

taking part in the training course were 100% covered by the German government. A significant part of this training course was hands-on work with a digital transformation tool that was explained and practiced one step at a time. Already during the training course, Thomas and his colleague had some exciting ideas that they then later introduced to the entire team.

Based on these experiences in the training course, Thomas and the team at the seminar centre were able to develop a new business model for the entire organisation together. Amongst other things, this new model places more weight than the previous model on digital distribution channels. This has made it possible to reach out to new target groups. Now, for example, individuals are increasingly using the good infrastructure for work and the beautiful countryside location of the seminar centre for work stays lasting several weeks. Their employers finance part of the costs incurred. In the end, everyone benefits: the new customers have a beautifully situated place to work and can work there concentratedly without interruptions. Their employers save on costs overall, even despite the subsidies that they pay for their stay, since now that the coronavirus restrictions have ended, they must spend much less to rent office space in the centre of a major city. To top it all off, the seminar centre also receives additional income that even overcompensates for the reduced income from school groups that have yet to return after the pandemic.

Thomas and his team are convinced that this was just the first step in the right direction. There are further specific ideas on the list of activities that they created for the implementation of their new business model, from which the team expects to see similarly positive results.

In a nutshell

The digital transformation tool is not a single tool. It is more of a ‘tool of tools’. Various well-known and effective methods and instruments are combined in such a way in the digital transformation tool that digital transformation, whilst not being easy, can be successfully carried out by any organisation to a large extent independently and without external consultation.

It is important that as many organisations as possible are equipped to set up the necessary strategic and operational course-setting in the direction of digital transformation and to initiate its implementation in their ongoing business processes.

Today, every organisation needs decision-makers and employees that have a deep-seated understanding for the potential of digital technologies and applications, and who can facilitate the necessary process of change in their organisation. It is with this end in mind that the digital transformation tool offers a self-learning tool that can be accessed online and is free of charge for all those involved to use directly at their places of work.

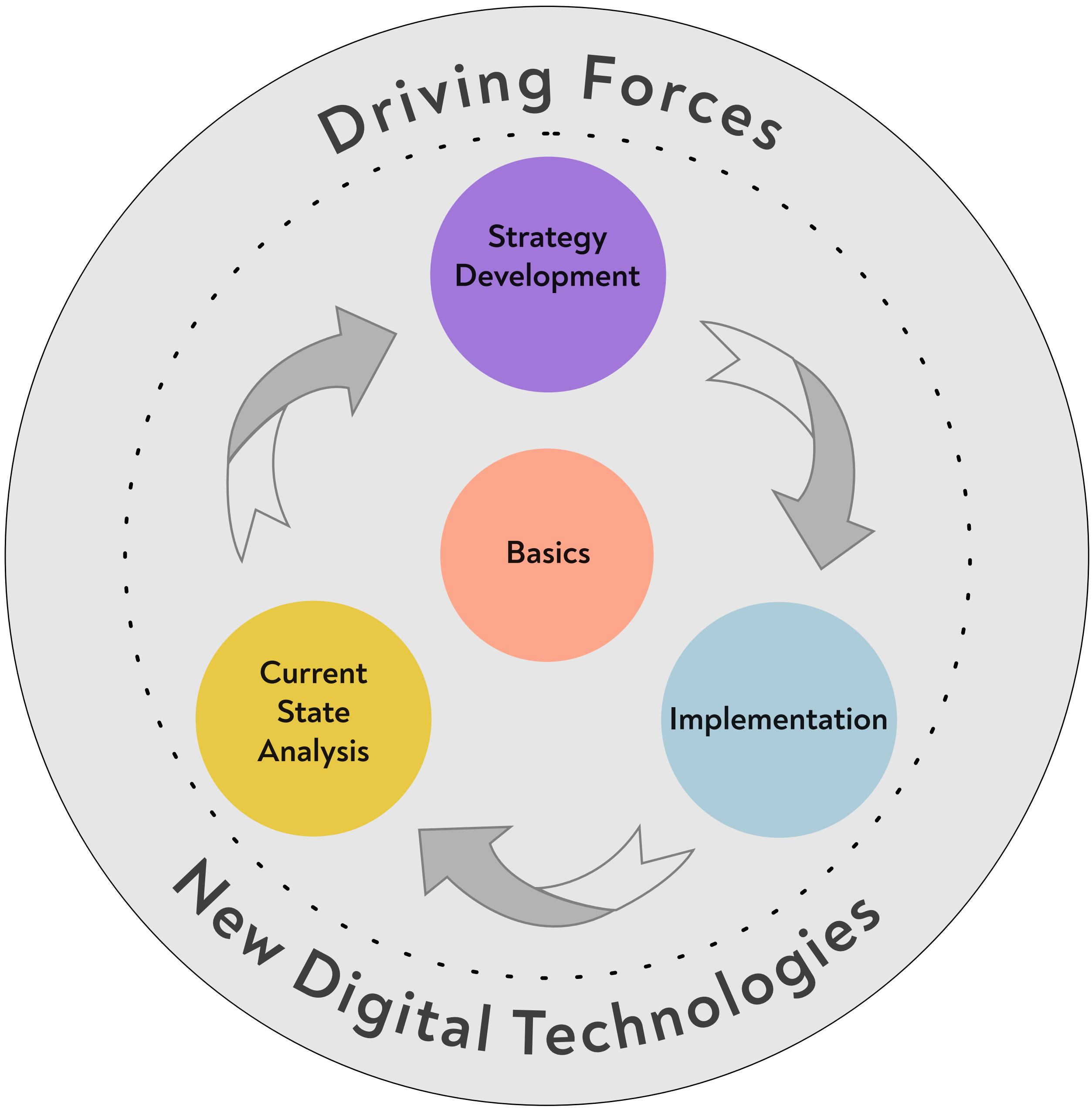
The working, learning, and planning materials that are provided by the digital transformation tool will help you to understand the opportunities and risks of digital transformation. By developing and implementing your individual digital strategy for transformation, you will be able to sustainably increase your competitivity.

The key elements of the digital transformation tool build on one another: A quick check will give you a first impression of where you are currently at. Building on this, short modules will help you to get to grips with the most important technological developments, for example big data,

back

blockchain or artificial intelligence (AI). The tool will then take you through your individual process of digital transformation with step-by-step instructions. With the prioritisation tool at the end, you have an instrument at your disposal that will help you to decide what should be done first.

At a glance: Digital Transformation Tool



INSTRUCTIONS

Digitalisation versus digital transformation – which is which?

Before you deal with the tangible steps on your way to digital transformation, it is important to clarity what digital transformation means. The easiest way to do this is to distinguish digital transformation from digitalisation, although both terms are usually used synonymously in daily usage.

What do we mean by digitalisation? To put it simply: what was previously done manually, for example on paper, is transferred into bits and bytes. This has already been happening for many years and yet there remains a lot of room for improvement in almost all SME and SMO. Digitalisation is also often equated to automatisation.

For example: a current process is reproduced digitally to shape the individual steps as efficiently as possible so that a customer enquiry is immediately followed by an offer being sent out directly from the system, the article's delivery is automatically initiated following an order, and the corresponding invoice is instantly available and passed on at the same time to the internal accounting team or to the interface with the tax consultant.

What, by contrast, is digital transformation? To sum it up: digital transformation is never 'driven' by technology. Simply because a digital solution exists does not mean that it should be immediately digitalised. When it comes to a process of digital transformation, your customer or target group is at the centre of your analysis. It is all about solving your customers' problems in a new or different way. Your aim is to solve both familiar and new customer issues with the best technical options.

Technology is only a means to an end. It is therefore essential that you should as soon as possible spend time considering the digital, technological developments that are changing our world for good. This is still the case, even if you are sure that artificial intelligence (AI), for example, does not yet have any impact on your business or your organisation.

So digital transformation goes further than digitalisation. Digital transformation is about changing the organisation as a whole. Yet often, all that happens is the following: many organisations simply try to modernise existing processes or areas of their business with the aid of new digital technologies. That is not enough. By proceeding in this way, you lose interesting and new avenues for business. You

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also lose sight of risks for your business that you have not yet identified.

The fact is that successful digital transformation requires digitalisation, but you cannot lose sight of the foundational process of digital transformation. A failure to do this will mean that although everything will initially be digital, you will still have no customers or people to use your services in the future.

Digital Transformation in practice: how should I proceed?

You should proceed one step at a time. This will strip down the complex process of your digital transformation into individual parts that are easier for your organisation to cope with. The phases of the digital transformation tool build logically on one another, and the tool contains all the instruments that you should use during this process.[1]

In **phase 1** you will lay the **foundations** for your process of digital transformation to be successful. You will learn which important management tools are key. In other words, you will learn amongst other things what you should pay attention to in the area of change or project management.

In **phase 2**, the focus is on the **current state analysis of your organisation**. Only when you know where your organisation is currently situated will it be possible to make conscious and good decisions about future changes. In this phase you will analyse your strengths and your weaknesses and will carry out an inventory of your current business model.

In **phase 3** you will make a decisive step from the **current state analysis to the new digital strategy**. You will develop – ideally together with your team – your strategy for digital transformation. Your future business model will emerge based on this.

Phase 4 is all about turning the decisions and new directions that you have made into reality. **Prioritisation and implementation** are the key terms in this phase. You will assess and plan all the necessary measures for your digital transformation to become a success.

Digital Transformation – step-by-step instructions

Digital transformation, even though it is all about using the most modern technology, is first and foremost a management task and, even more than this, a leadership task. No one must follow technical trends blindly, simply because everyone is talking about them.

If you consistently use the systematic approach of the digital transformation tool, then you will hold in your hands at the end a planning list that will tell you what to do next. In this way, you will lay a foundation for your organisation to be able to act successfully, even in five or ten years' time.[2] In line with INCLUDE, shape the entire process to include as many people as possible from all parts of your organisation. Think about whether it makes sense to include important cooperation partners at regular intervals.

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[1] The step-by-step approach of the digital transformation tool is based on an extensive process model that was developed by the LUISS Guido Carli University in Rome, together with several partners from the INCLUDE project consortium, including emcra GmbH from Berlin. You can find out more about this process model here: https://digital-transformation-tool.eu/process-model-for-digital-transformation/.

[2] You can find a more detailed version of the following approach with four phases and ten steps here: https://digital-transformation-tool.eu/dt-step-by-step/. There you will also find links to the required working and learning materials. If you would like to study a more in-depth description of the four phases before starting your process of digital transformation, then we recommend the modules 'Your digital transformation part 1 and part 2'. You can find these here: https://digital-transformation-tool.eu/training/course/view.php?id=11&lang=en. This is particularly advisable for leaders who will formally decide in their organisation whether and how a process of digital transformation will be begun.

Phase 1 Foundations

Step 1: Start your project of digital transformation

The following important aspects should be considered here: you will decide internally how your project will be organised, who will lead it, and which people will belong to the project team. In addition to this, it is important to decide how the project will be reported in the entire organisation and how feedback will be gathered from those who are not directly involved in the project.

In terms of team development, one tool at your disposal in the INCLUDE tool 'Team Canvas'. To maintain a constant overview of all ideas and suggestions linked to your process of change, you should use the worksheet 'Change Protocol' that has been specifically designed for this.

All phases of your process of digital transformation require skills from the areas of project management, change management, knowledge management, and risk management. Even if you already have good skills in these areas, you should still glance over the corresponding modules that have been made available.

Phase 2 Current State Analysis of Your Organisation

Step 2: Gauging the external influences on your business

You will now get to learn about the PESTLE analysis. With this tool, you will gauge all external influences that influence your organisation from the outside. The more people you involve from the different areas of your organisation, the more comprehensive and meaningful the result will be.

Step 3: Gauging the strengths and weaknesses of your enterprise

The GAP analysis will help you with this. With this instrument you will recognise in which areas of activity you are currently performing better or worse than necessary or as expected.

Step 4: Describe your current business model

You can do this well and clearly with the business model CANVAS tool. With the result you will receive a chart that clearly depicts the nine most important key elements of your organisation on a single sheet.

Phase 3 From the Current State Analysis to the New Digital Strategy

Step 5: Collect facts and suggestions

In this step you will first research factors that generally set successful digital business models apart. You will find out more about leading companies in your market or about famous organisations that you know very successfully manage to address the same target group as you in a digital way. When doing this analysis, it is worth consciously looking for example companies or organisations outside of your region or your country. It will be easier to have contact with these organisations since they are not generally direct competitors.

You should also analyse the direction in which your market or your competitors will most likely develop in the years to come.

Finish by examining both the needs and buying decisions of your customers or target group, as well as – and this is even more important – the reasons why those who would be interested do not or do not any longer buy from you or use your services as they once did. There are numerous examples of good practice from all over Europe available to you in the digital transformation tool to get you started.

Step 6: Learn about the 'driving forces' of digital transformation and assess them

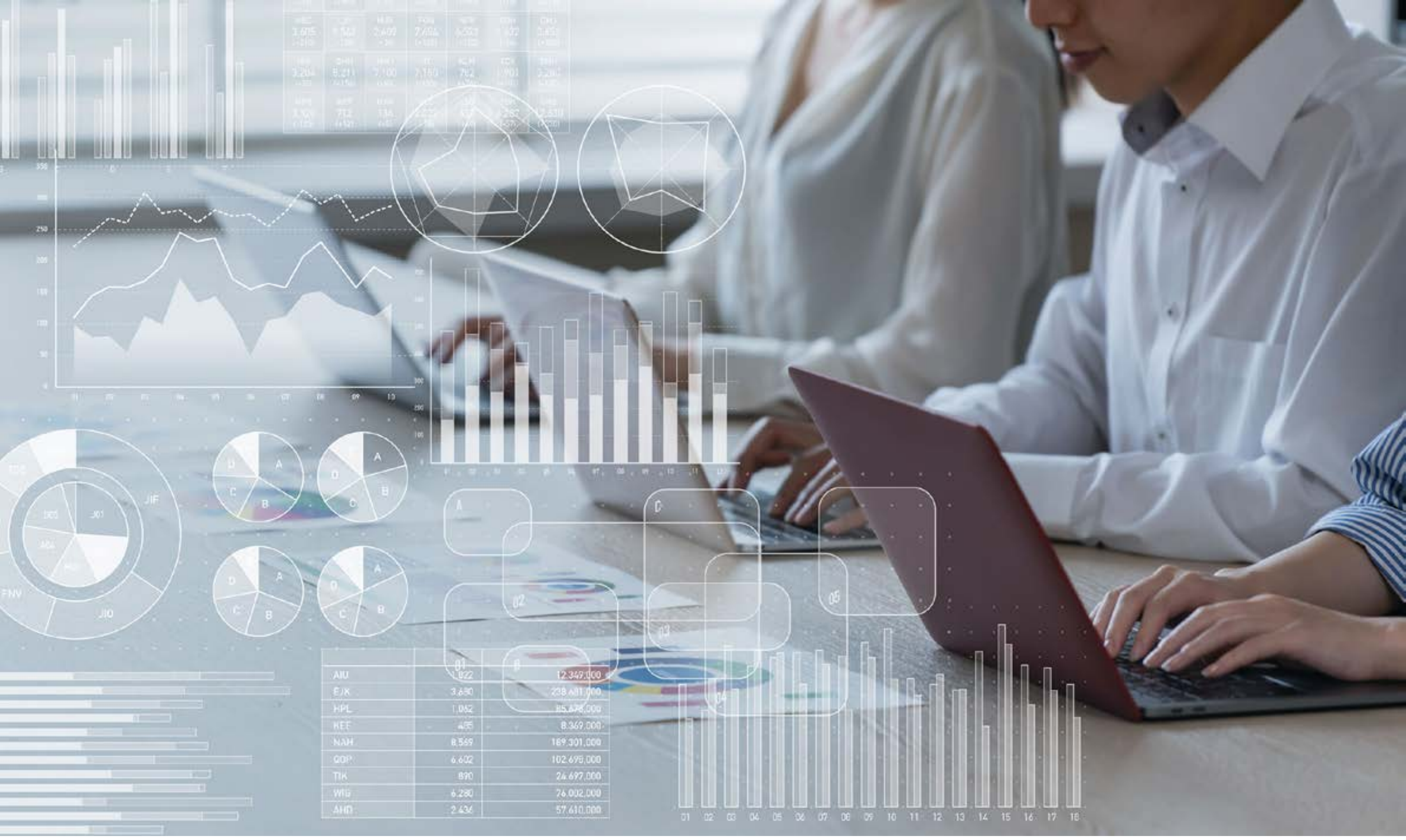
At this point you will focus in more detail on the ten most important technological developments, including big data, blockchain, or artificial intelligence (AI). You will decide which of the new digital technologies are relevant for your organisation or could be relevant in the future.

Step 7: Develop new business strategies

You will develop new business strategies with the help of the SWOT analysis (SWOT = Strengths; Weaknesses; Opportunities; Threats). Insights from the previous steps will flow into this, particularly the opportunities and risks or the strengths and weaknesses that you have gauged in steps 2 and 3 with the aid of the PESTLE analysis and the GAP analysis.

Step 8: Develop and describe your new business model

You will now adapt your business model or develop a completely new business model. You can use the results from the SWOT analysis that you have previously carried out for this. You will work again with the business model CANVAS tool that you have already



become familiar with in step 4.

Phase 4 Prioritisation and Implementation

Step 9: Sorting and prioritising the planned activities

At this point you should deal with the following important tasks: you will define criteria for the prioritisation of your digital transformation work. On this basis you will assess the urgency and expected impacts of the individual activities. It is now important to designate the resources available for the implementation, including both staffing and financial resources. This issue will have a large impact on the speed and on the approach towards implementation.

At the end you will have a table that lists your most important steps of digital transformation in order of their priority. For the prioritisation process to run in a structured way, a prioritisation tool, developed for this purpose, has been made available to you.

Step 10: Starting the implementation and monitoring the progress of the work

You will now determine who in your organisation is responsible for implementing which improvements. It can be sensible to designate one individual for the whole duration of the implementation who will maintain an overview over all the activities to be implemented, when important milestones have been reached, and which resources are available. Just as in all the previous steps, it is important that your entire team or organisation is involved in the process of implementation. Think about how successes or setbacks will be communicated in the implementation phase. Bear in mind that the skills in the areas of project management, change management, knowledge management and risk management, the significance of which was already hinted at initially in the first step, are decisive for the success of your process of digital transformation. This is particularly true when it comes to the implementation.

You can congratulate yourself when you and your organisation have run through all ten steps. By doing this, your organisation has taken a very important step in the direction of the future. We do have to dampen your spirits somewhat at this point, however. Anyone who thinks that they have thereby mastered digital transformation has made a mistake. New technological developments will keep on entailing new opportunities and risks in the years to come. It is therefore advisable to repeatedly run through the ten steps of the digital transformation tool. The good news is that the process will go more quickly when you do this work a second time, since you will be able to draw on the results from the first iteration.

In addition to this, technological advances are used to initiate the process of digital transformation that is described above, but the substantive implementation in your organisation will always be shaped by people. The human factor is decisive if your digital transformation is to be successful. This is why engaging with further INCLUDE tools in this handbook is an essential foundation for your success.

Digital Transformation Tool and INCLUDE – how do they fit together?

The goal of the digital transformation tool is to make a large impact with lots of small steps. It therefore makes sense for most organisations to complete the learning and working steps in the recommended way. All the modules about the tools have been designed in such a way, however, that they can also be profitably used in isolation. Depending on your organisation's level of development, you can use the tool as a whole or separately during your INCLUDE process of development.

Carving out appropriate timelines: Rome was not built in a day

Please note: developing a strategy for digital transformation is a process, for which you should plan several weeks or even months. Rushed actions are counterproductive and often expensive. Take the time that you need without neglecting your day-to-day business. This is even more the case if you would like to integrate the digital transformation tool in your INCLUDE organisational development. If this is the case, you should take longer than the three months suggested in INCLUDE step 8 'Learning, trying and practising' (cf. chapter 4).

Why change management is so important

When it comes to change management, many people say: 'I can do. I'm doing it all the time.' You will experience similar reactions when it comes to project management. People will say: 'I've been managing projects for 20 years. What do I still need to learn?' It is not uncommon, however, for that to mean you have been making the same mistakes for 20 years and have unfortunately not grown any wiser. For most people it is true to say that they are equipped with general knowledge that they have gained through practical experience. They are aware, however, that there are still smaller or larger gaps to be closed. We recommend that you start with the topic of change management. Why? Because many processes of development and change in organisations fail due to a lack of solid expertise in this area that is suitable for everyday life.

What are the success factors for digital business models?

When searching for new business models to work in the digital age, you should take the following three factors into account:

1. Connect better with customers and partners,
2. Offer solutions and systems, rather than single products, and
3. Expand your services with additional benefits for customers.

How can I discover new business ideas?

In step 5, 'gathering facts and suggestions', it was already emphasised how important it is to analyse your market environment and the leading companies in your market. Remember to look beyond your own country's borders, since this usually yields more than simply looking at your local surroundings. There are comprehensive funding programmes available to you for this within the EU. In addition to this, there are three

starting points to bear in mind:

1. Have an open dialogue with your employees. They will often know a lot about your competitors.
2. Also assess social media channels for competition monitoring and market analysis.
3. Invest in dialogue with your customers. Your customers will know exactly why they shop with you. When developing new business models, it is even more important to ask those who have deliberately chosen your competitor over you.

Introducing new things consciously, or 'take it slow when you are in a rush'

Once your new CANVAS business model in digital transformation process step 8 is completed, you should mark – ideally in colour – which areas of content should change in relation to your current business model. Place your old and new business model side by side and think about whether all the changes are plausible.

At this point you should press pause somewhat and critically consider your new business model from a distance several times.

You are now most likely making far-reaching decisions, and they should be well considered. At this point, hurry will most likely lead to expensive mistakes. For example don't let external IT consultants lead you into quick actions whose consequences you may not completely understand. We recommend that you use either 'consent decision-making' or the 'consultative individual decision' for these important decisions. Both procedures are presented in detail in this chapter.

Proceeding agilely: small steps to success

All your plans have been prioritised. You know what you should do and who will accompany the entire process internally. What does a realistic timeline now look like? It definitely makes sense to schedule milestones and fix a date when the entire process should be completed. You should still plan for surprises and obstacles during your process of implementation. This path rarely follows a straight line. It is important to remember that many roads lead to Rome.

It is therefore important for you to set as many short interim goals as possible and to be continually analysing successes and failures along the way. Let yourself be inspired by the 'scrum' tool in this chapter. For example,

work packages such as choosing a new piece of software to work with in the years to come can be split up into individual steps:

- Analysis of your own needs and creating a catalogue of demands
- Market analysis: who is offering what?
- Choice of two to three favourites
- Intensive testing of the chosen options
- Making a decision
- Implementing the software
- Training staff internally
- Evaluating the new software once it has been implemented in daily business for a while
- Deciding on and implementing necessary changes

This is roughly the principle of an agile approach: setting as many small but sensible steps or interim results, and then working through these quickly and thoroughly.

Ideally, you should always only take one step at a time. You will then be able to successfully keep on top of this work alongside your daily business. Plan a round of feedback after each step. Ask the following questions:

- What went well?
- What do we have to do differently?
- Are there new pieces of information or ideas that we need to bear in mind in our process of digital transformation before proceeding to the next step?

If you proceed in this way your entire organisation will be permanently 'learning' more throughout this process.

RESOURCES

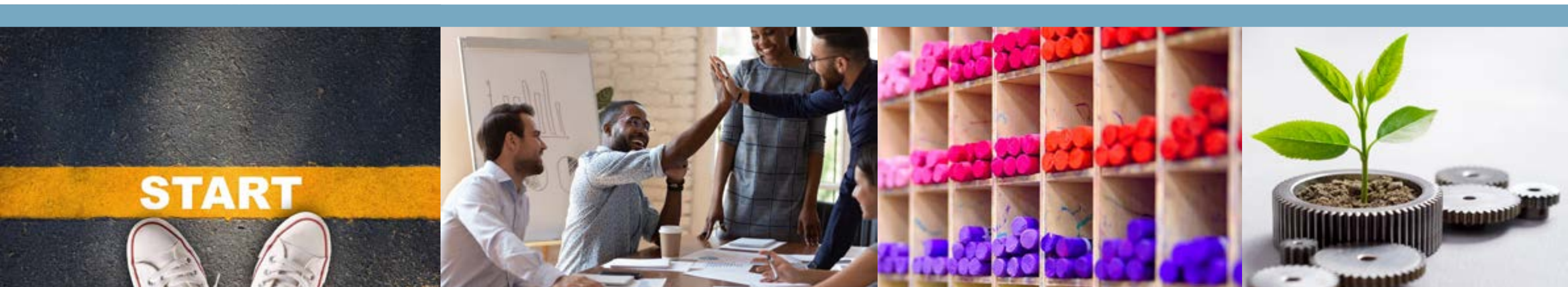
The digital transformation tool is a product of the project 'Digitalisation' (2017-2019), funded by the EU and developed together by seven organisations from five countries (Bulgaria, Germany, Greece, Italy, and Cyprus). The lead partner responsible for the project was emcra GmbH in Berlin. The other project partners were the Cyprus Project Management Society (CPMS), the chamber of industry and commerce from Vratsa in Bulgaria, lvh (regional trade association in South Tyrol, Italy), the Institute for Business Consultancy, Development and Research e.V. (IBWF) in Germany and the LUISS Guido Carli University in Rome.

All the necessary resources, as well as further useful links and reading recommendations are available online in English in the corresponding modules of the digital transformation tool. The resources for the tool are subject to a Creative Commons Licence and are freely available.

We recommend the following text if you want to go deeper. This is also a result of the EU project mentioned above: LUISS Guido Carli University et al (2019): Process Model for the Digital Transformation of SMEs:
https://digital-transformation-tool.eu/wp-content/uploads/2020/01/DIGIT_Process-model_O1_FINAL.pdf

#digital transformation #digitalisation

#business model #change management #project management


START

07

The Digital Age Technologies and New Forms of Work

The Digital Age: Key Terms, Technologies, and Transformation

Inclusive leadership at the start of the 21st century can only work if you as a leader deal with the topics of new technologies and the new forms of work resulting from them, such as 'remote work' for example. The 'digital age' is one of the most important underlying conditions for leadership today and tomorrow. INCLUDE leaders should make it their aim to embed the discussion about and use of new technological developments in their organisation's DNA. This endeavour is not a sprint. It is more like a marathon. To make the first phase of your personal long-distance digital run easier, we have summarised the most important information from an INCLUDE perspective in this chapter.

The following chapter is subdivided into three sections. Taken together, these sections will provide you with an answer to the question of what consequences the digital age will have on the area of leadership.

In the first section, entitled **'complexity, business model, resilience, decisions, new work and new forms of work'**, we will introduce you to key terms and their meaning for your work as a leader in the digital age. You will receive various recommendations for where you, your team, or your organisation can begin to redefine or differently define leadership.

The second section has the title **'quick and to the point: ten digital technological developments'**. It will introduce you to the most important areas of technological development that will make a lasting change on our world. You should know and understand all ten areas at least to some degree if you are to assess the extent to which they are important for your organisation, whether now or in the future.

In the final section, **'digital age – using opportunities and encountering challenges'**, we will recommend that you link your process of digital transformation with the ongoing development of your internal processes and structures based on the INCLUDE approach. You will find out how you can practically undertake this project and how it can be best integrated with the step-by-step INCLUDE approach that we introduced you to in chapter 4.

Complexity, business model, resilience, decisions, new work, and new forms of work

Several key terms can be identified for your leadership tasks in the digital age. You and your team members should know their meaning and implications. The following terms will therefore be discussed in brief below: complexity, business model, resilience, decisions, new work, and new forms of work.

An important distinction: inner and outer complexity

The modern world is complex, and it is getting more complex all the time. Most people see this as an unalterable characteristic of our digital age. This verdict is rarely contradicted, but it is false. At least when we start by concentrating on our own organisations and put the world around us to one side for a moment.

The fact is that there are numerous opportunities open to us in our organisations to reduce complexity, in other words to make everybody's life and work easier. Complexity in organisations is the result of lazy thinking and is commonly self-inflicted everywhere, for example, where processes of work, communication, voting, and decision-making are not being shaped in a way that it easy, transparent, or focussed. Complexity is a trap within every organisation that you and your team must not fall into.

The same is also true of new forms of work that have arisen in the wake of digital change. You can decide yourself whether 'remote work', for example, is successful in your organisation or whether you allow it to result in new structures developing in parallel to your existing structures which, in the worst-case scenario, also entail a huge amount of new bureaucracy. There are various tools in chapter 6 to help you make your organisation's internal world easier (see 'BetaCodex', 'Cell Structure Design', 'Consent Decision-Making', 'consultative individual decision-making', 'team contract', Team Canvas', 'Delegation Board', 'Scrum', 'remote work', 'how to conduct online meetings').

Complexity is a different topic, however, when we start looking outwards. The complexity of our digital world really is an external factor here that you generally have no influence over. You can, de facto, only react to external developments. The question is, however, how good or adequate your reactions are. There is a lot of leeway here. It is no coincidence that there are organisations who are using digital change and the technological developments it entails masterfully. Others, by contrast, are stuck like the proverbial rabbit in the headlights. What is the difference between them? Leadership in the digital age means proactively engaging with new technologies. This is the only way to identify and use the opportunities and mitigate or even completely prevent the risks. Good leaders approach this task consistently with their teams.

Starting from scratch again – your business model

Let's go back to the area that you can influence: your own organisation. Let's try a thought experiment and answer the following question: how would you construct your organisation if you begin again completely from scratch? What do your customers or target group want from you today? When answering this question, don't let yourself be led astray by what currently seems to be possible or impossible. You can only really find new solutions if you take this task seriously. As soon as your ideas link up with the ten technological possibilities that you will find out more about below, opportunities will open up to you that you may have previously overlooked. Optimising your tried and tested formulas is often not enough in times of rapid change. For many organisations, their medium and long-term survival will only be possible if they move past their previous systems or business models.

Your business model would definitely be different today and you would introduce new processes at work if you didn't already have your current ones. Forms of work such as 'remote work' or technical possibilities like working together in the cloud without installing local software are now open to you. These options probably weren't available when key strategic decisions were made that shaped your organisation into what it is today. The question therefore is: why are many people so slow to agree to rethink their entire business and organisational model? Because people usually find it difficult to walk away from their well-worn trails.

Sticking to the path and the crippling power of 'what is' are chains that can only be cast off with difficulty. But a change of thinking has begun, and the coronavirus pandemic acce-

lerated this process, especially when it comes to technical solutions. Many leaders were able to recognise during the pandemic that it is possible to abandon the well-worn trails. Only a very few continue to question the necessity of digital transformation in their organisation. Generally speaking, the focus is now more about the 'how' than the 'what' when it comes to implementation. Most organisations need time for this because these questions are not at all easy to answer.

INCLUDE offers you a way to connect your process of digital transformation with the ongoing development of your internal structures and processes. The number of leaders who recognise that great action is required in organisational areas just as in the area of digital transformation is constantly increasing. At the same time, many are not yet prepared to admit that their organisation should be radically changed. Why is this? Most leaders and even the majority of employees are still working in the 'top-down' world of the 20th century. They are mostly unaware of the numerous developments and answers to the question of how they could construct their organisations better and organise their processes at work in a more up-to-date way.

It is not unlikely that these new organisational models or approaches would enable at least as extensive revolutionary changes as the technological changes that you will become more familiar with below. Leadership in the digital age should therefore start here. Leaders, teams, and entire organisations must be more prepared to act when it comes to changing structures and processes. This means first becoming familiar with the opportunities that are open to them today. Only then can they decide which direction they would like to go in and which opportunities and also risks this entails. Those who orient themselves around the step-by-step INCLUDE approach as we introduce it in chapter 4 when doing this are on a very good trajectory (the central tools for this process that you can find in chapter 6 are 'Beta-Codex', 'Cell Structure Design', 'Open Space for Organisations', and the 'digital transformation tool').

Increasing resilience and making better decisions

The digital age entails risks and opportunities. You will only be able to make well-considered decisions if you understand this. This is why the question of what you and your team can undertake to enable better decisions is at the heart of the discussion in this section. The goal is that you will be equipped for the challenges of the digital age. The key term that we have chosen for this is resilience. It is all about increasing your organisation's resilience in a rapidly changing environment.

Resilient organisations in a digital age don't just concentrate on systematic risk and opportunity management,[1] even if this does constitute a major factor. INCLUDE leaders and their teams take the term 'resilience' further and pay particular attention to the following aspects: **factfulness, the significance of heuristics, risk and opportunity competence, making decisions in uncertainty, the possibilities and limitations of predictions**, and **preparing for unexpected events**.

Factfulness: Hans Rosling coined this term together with his co-workers (Rosling/Rosling Rönnlund/Rosling: 2018). Factfulness is an important prerequisite for critical thinking. This approach will help you to develop and maintain a fact-based view of the world. In essence it is all about searching for verified facts before coming to far-reaching conclusions. Anyone who adopts this approach will also learn to recognise and avoid the most common misconceptions that people commit when dealing with information.

Rosling and his co-workers explain with the help of ten human misconceptions that can be repeatedly observed why we often have a false or at least heavily skewed perception of our environment. For INCLUDE leaders, the approach offers ten rules of thumb to help them avoid wrongly interpreting situations and facts in the future.

This is helpful, for example, if you are in danger of falling into the so-called urgency trap. A false assessment of urgency is one of the ten factfulness misconceptions. Wherever the process of digital transformation was previously given too little attention in an organisation, leaders tend to think that it must go all the more quickly from now on. They act as if it is 'now or never'. A big step must be made, and they might, for example, buy a certain piece of software as quickly as possible. The assessment of this investment's consequences is done half-heartedly, if at all. It would have been better to take small steps and to make decisions consciously one step at a time. The factfulness approach will help you with this and with many other challenges to assess a situation as accurately as possible.

The significance of heuristics: people are rarely able to see through difficult decision-making situations completely. Many organisations also lack the necessary resources to do this. In these situations, the key thing for leaders and teams who make decisions autonomously and independently in line with INCLUDE is to use good and easily applicable tools. This is where heuristics come into play. Heuristics are rules of thumb that have proven their usefulness in the past in many different complex decision-making situations.

The ten factfulness rules of thumb mentioned above are just such tools to help you make decisions. There are many more, however, and their effectiveness has been demonstrated in a particularly striking way by Gerd Gigerenzer (2020; 2021). Anyone who dives deeper into using heuristics will thereby increase their personal and collective skills with risks and opportunities for good.

One heuristic that you can use when dealing

[1] The 'Guide on Business Resilience' offers a simple and practical introduction to the topic of 'opportunity and risk management'. It was developed as part of the EU-financed project CASSANDRA by experts from various European countries. You can download it here for free without having to enter any personal details if you register as a guest user: https://cassandra-resilience.eu/moodle/login/index.php?lang=en.

with digital technologies is: 'don't buy any technology that you don't understand!'. Another one that can prove very useful in any process of change is: 'if it isn't broken, don't fix it!'. Doing nothing can sometimes actually be the best decision. Leaders or teams that put together a collection of heuristics appropriate to their work will find it easier when they must make bold decisions despite missing information.

Risk and opportunity competence: one task of leaders in the digital age is to improve the risk and opportunity competence of themselves and of their teams or individual colleagues. Anyone can learn to deal with opportunities and risks better. Those who consciously do this will face challenging decision-making situations in the future with less fear and will make more courageous use of the opportunities open to their organisation.

So-called 'deciding defensively' (cf. Gigerenzer 2020: 79f.) is one example of what the topic of risk and opportunity competence is all about. This refers to an individual or a group choosing a safe option B, although option A had been identified as a better alternative. This approach can often be observed in hierarchical organisations. Those involved primarily care about avoiding a failure that could be traced back to them as a mistake. The entire organisation pays a high price for this if option A would have been a real step forward.

Leaders and teams that focus in detail at this and other aspects of competent decision-making will try to develop the internal structures in their organisation so that option A will be chosen where there has been a positive assessment of the opportunities like in the example above. They know that no progress is possible in the digital age without taking calculated risks.

Making decisions in uncertainty: the vast majority of decisions that you and your team will need to make about your structures, processes, and future use of digital technologies are not easy. There will always be a certain amount of uncertainty. It is therefore all the more important to see through an important decision as far as possible.

An excellent entry point to this is focussing on the work of Daniel Kahneman and his colleagues on the topic 'Quick thinking, slow thinking' (Kahneman 2012) and on the causes that lead to people making skewed decisions (Kahneman/Sibony/Sunstein 2021).

Kahneman made a general distinction, for example, between two so-called 'systems' that are active in our brains. System 1 enables us to make quick decisions but unfortunately does not protect us from thoughtless mistakes that we could have avoided with a little more thought. System 1 is very useful in many situations because system 1 activities occur automatically, quickly, and usually without much effort or conscious management. Decisions that we make when riding our bikes, for example, are usually left to our well-trained system 1.

Anyone who wants to develop their system 1 should, among other things, make conscious use of heuristics as already outlined above. In situations of acute danger there is usually no time for slowly and carefully weighing up options. If you can bank on a suitable rule of thumb in these precarious situations, then you are increasing the likelihood of even an impulsive system 1 decision leading to an acceptable outcome.

In contrast to system 1 decisions, system 2 decisions are always required for strenuous mental activities where we must use energy and concentration. This is technique we should use to make important organisational or technological decisions – whether alone or as a team – that will likely affect our future as an organisation. It is worth thinking through challenging decisions for long enough until you are able to make the decision. The better you and your team see through a specific problem and the more intensively you focus on the potential mistakes that could skew your perception, the more easily identifiable a solution will be for everyone.

The possibilities and limitations of predictions: 'predictions are difficult, especially when they're about the future'. This famous quote has been ascribed to Niels Bohr, among others. This statement is absolutely correct about the distant future. No one can exactly predict the geopolitical or economic situation in Europe in ten years. When it comes to shorter periods and more clearly focussed analyses of the future, however, a different viewpoint emerges. Philip E. Tetlock in particular was able to show this impressively in his decades of studies on the topic of prognoses (cf. Tetlock/Gardner 2016).

Good prognoses or analyses of the future with a short to medium-term horizon are possible, but only if you approach them systematically and as iteratively as possible. It is particularly important to regularly conduct an ex-post analysis to learn from the extent to which your earlier estimates were right or wrong.

The necessity of seeing through difficult decision-making situations was emphasised further above. Applying Tetlock's findings to this means that a difficult decision should be broken down into as many easily solvable partial problems or decisions as possible. This is one of the ten commandments of good prognosis that Tetlock was able to derive from his long-term empirical studies.

Tetlock also found out that diversely composed teams can deliver better prognoses under certain conditions than individuals. What is required for this? The most important thing is a working culture where 'constructive arguments' are possible. It must be possible for differing opinions to be

voiced. The working culture should also not be shaped by an exaggerated regard for the sensibilities of other members of the group. Wherever people can speak constructively and openly, there is a greater chance of reaching a better estimate of the future together ('Consent Decision-Making' in chapter 6 offers you a good foundation for this).

Better team prognoses in comparison to individuals were only possible, however, when all team members felt psychologically safe and when the quality of their group work was shaped by mutual appreciation and interest. These are key components of the INCLUDE approach. That means that anyone establishing teamwork according to the INCLUDE ideas will also be able to generate lasting improvement to the team's ability to predict the future. This is an advantage that should not be underestimated with regards to the challenges of making decisions in the digital age.

Preparing for unexpected results: most organisations – regardless of whether they are big or small – are led centrally from the top down. You can find the same thing happening in politics. Centralised systems react incredibly fragilely to unexpected external events or shocks, however.

What are the alternatives to fragile organisations that know how to deal better with unexpected extreme events? Nassim Taleb (2014) distinguishes between three types of resilience: fragile, meaning easily destructible, robust, and antifragile. Most organisations are fragile and are therefore little or not at all prepared to be able to act confidently in the face of unanticipated events. Companies where everything is optimised to be just-in-time, for example, are quick to cry for government help when a pandemic or an energy crisis places seemingly unsolvable tasks in their path. Why is this? They generally don't have any redundancies, for one thing, and they also usually have high investments in their accounts that have been financed by borrowing at the same time as having little reserves.

INCLUDE organisations are therefore journeying towards greater decentralisation etc., because they – like Taleb – have recognised that they can thereby increase their organisation's long-term chances of survival. Start by thinking about what could contribute towards

you becoming more robust. Enough equity and sufficient reserves are a good idea. A decision-making principle that, among other things, works with the help of heuristics (see above) also belongs here. Collaborative work based on principles (for example with the help of 'BetaCodex' in chapter 6) rather than on rigid rules that restrict innovation will also contribute to this. A positive culture of mistakes that values mistakes as necessary and welcome stages of learning on the way towards any improvement will also make you more robust (cf. tool 'Fuckup Nights' in chapter 6).

Antifragile structures and organisations, in contrast to robust organisations, go one significant step further. Organisations or people are antifragile in Nassim Taleb's sense of the word when they can even turn unexpected events to their advantage. Where traditional structures are damaged or collapse, antifragile structures benefit. They have free resources, for example, that they are then able to activate when they see a good opportunity in a crisis, whilst their fragile competitors are completely absorbed with their reaction to the crisis and have no extra capacities to proactively engage with the opportunities that every crisis entails. Teams and leaders that go along with Nassim Taleb's thoughts will discover numerous possibilities for increasing their resilience as an organisation in the digital age..

Organising ‘new work’ – but why?

The question may surprise you since ‘new work’ is one of the most commonly used and discussed approaches when it comes to dealing with digital change. ‘New work’ is not a concept that can be easily grasped, however. It rather involves a whole collection of possibilities which should convince organisations to establish more modern forms of collaboration. These concepts frequently revolve around shaping a more open and participatory culture of work with the help of approaches such as work-life integration, mindfulness etc., where people are at the centre, just like in INCLUDE. Generally speaking, there are few objections to ‘new work’, nevertheless INCLUDE deliberately takes a different path for a good reason.

Why? Because you cannot change an organisational or working culture by sending your team to ‘new work’ seminars whilst keeping virtually everything else that actually governs collaborative work within your organisation the same as it has always been. Those who are serious about ‘new work’ must first focus on the structures and processes in their organisation. Just as good software from a bad analogue process does not make a good digital process, so it is unlikely that ‘new work’ approaches will make an inclusive organisational structure out of a hierarchical one.

A second argument is even more key. An organisation’s culture cannot be changed by individual measures. Organisational and working cultures are always the outwardly perceptible results of work on the system. You can observe an organisation’s culture, but you cannot directly manage it. There first has to be change on the level of the system.

If you choose the INCLUDE approach, then your specific ‘new work’ structure will automatically arise out of the many decisions you make together with your team. Your team members or your entire staff will then be able to decide themselves what they need to better harmonise their professional and private lives, for example. If an organisation is made with and for the people working there, then 'new work' will naturally develop as a by-product.

Rightly implementing new digital forms of work

Digital development has already led to far-reaching changes in our working lives that every inclusive leader needs to deal with. Many tasks that people once completed face to face, for example together in an office, are now completed together digitally from different places. This approach was less commonplace before the coronavirus pandemic than it is today. Remote work and working together online have dramatically increased (see also the tools in chapter 6). In a limited sense this also applies, among other things, to factories or workshops with traditional processes of production or where people work for and with others such as in a hospital, for example. But digital tools are even offering seemingly limitless possibilities in these areas for improving work or making it easier.

What should be considered when it comes to online work? Unfortunately, many leaders make the exact same mistake as their team members by transferring their experiences 1 to 1 from the in-person world of the office to the remote or hybrid working world where some come into the office and others work remotely, either all the time or regularly. There is often no awareness of the fact that digital forms of work do not follow the exact same dynamics as classic in-person work.

INCLUDE leaders should be aware of the differences between different worlds of work if they are to respond appropriately. Being an inclusive leader in the digital age means paying particular attention to the following areas: **more communication, dealing with the speed and pressure of change, increasing commitment**, and **the ability for remote innovation.**

More communication: the more people work apart from each other, the more time you should plan as a leader for communication with your team or with individuals. Regular 'online visits' to remote workspaces will thereby replace quick conversations in the corridor at the office.

Remote work is also not the same for everyone. Extroverted people respond differently to it than introverted people. It is therefore crucial that you know the people that you are working with well. A central tenet of the 'remote work' tool in chapter 6 is: 'in the history of leadership, a personal relationship with team members and an understanding of each individual was never as important as it is in the digital world.' There is nothing more to add.

Dealing with the speed and pressure of change: the tempo of innovation and change is continually increasing in the digital world. As a leader, you should take this seriously and respond to the fact that many people cannot cope well with the speed of change and the pressure that this results in.

INCLUDE leaders will address this fact in their teams or in their organisations. It is helpful for you as a leader to admit that you yourself don't find it a piece of cake to cope with this fast-paced period. Those who regularly focus attention in their team on the topic of the speed of change and the pressure that this produces will contribute towards team members responding more openly and with less fear to the next decision, for example about the purchase of a new piece of software.

Increasing commitment: do you want a team of replaceable nomads who each work for whichever contractor offers them a few more euros, or do you want a team acting for the medium to long term, where the individual members value each other and like working together?

A lack of commitment has increased in our remote world. For leaders, this means that you have to think about how a sense of belonging to your organisation can also be created when we are not all spending our working hours together in the office and then perhaps meeting in the bar around the corner for a drink.

For many people, working remotely means spending the working day alone at home or at another location. What can create greater cohesion in this working context? Shared values and the perceptible sense of an activity in particular act as the glue that helps people to keep going despite setbacks or in difficult times, and not to wander off to another employer like a replaceable cog in the machine. Employees stay with their employers for longer if they experience shared values being lived out in their organisation's daily life and if they have the certainty that they are working towards a shared goal together with other people that they value. Leaders who ask and answer the 'why' question with their teams have better chances of working with committed and trustworthy team members in the long term (cf. the 'Golden Circle' tool in chapter 6).

The ability for remote innovation: a tricky topic! Because this is where we come to the limits of our lovely new digital working world. As a leader, you should create as many opportunities for discussion – including random and unplanned ones – as possible for ideas and innovation. This is precisely why the Open Space method (see tool in chapter 6) is so successful, because it enables (random) meetings between as many engaged people as possible with completely different ideas and experiences in an elegant and simple way. Our best ideas sometimes come to us over lunch with our colleagues. Open Space has translated this realisation into a very well-functioning event format.

But what can you do when there are increasingly fewer (working) times or breaks for people to spend time together in teams that work remotely or in a hybrid way? Your innovation can suffer without constant opportunities for exchanging ideas. There are, of course, options: you can deliberately create times within your online work where there is nothing on the agenda. Your remote team members in particular will also have little objection to a regular online lunchbreak spent together.

The topic of innovation and ideas is always a good opportunity to physically gather the entire team in one room. We recommend the Open Space format for doing this. You might use it to discuss the impacts of the ten technological developments as a team that we will introduce you to below.

Quick and to the point: ten digital technological developments

The digital age is shaped by very tangible technological developments, as well as by new challenges and opportunities. You should know the ten particularly important areas that are having a lasting impact on our world so that you can assess whether they are important for your organisation, whether now or in the future.[2]

Big data and real-time analyses

The term 'big data' refers to large amounts of structure and unstructured data that are difficult to process with previously common-place databanks and software technologies due to their size. The term includes all data that arises in the digital age through the use of various technologies. This data is collected from various sources, for example emails, mobile devices, applications, databanks, or servers.

It is important to distinguish between structured and unstructured data. Structured data is data that can be collated in traditional tabular or databank structures. In companies, this could be customer lists, product data, or business processes, for example. Unstructured data is digitalised information that is generally too large to be saved in a databank. Examples are data from google trends or measurement data from sensors in the internet of things (see below).

Today we refer to everything from databank entries, photos, videos, recordings, and texts through to data from sensors as 'data'. Almost every action that a person makes leaves behind a digital trail. We are constantly generating data: surfing the internet, using our smartphones with their GPS function, communicating with friends on social media or in chat apps, shopping online and so on.

Interesting information can be derived from this flood of data. When this data is analysed as soon as it is accrued, we call it real-time analysis. For INCLUDE leaders, big data and real-time analysis offer the opportunity to

[2] You can find easily understandable, comprehensive informational texts about each of the ten technological developments described below here: https://digital-transformation-tool.eu/training/course/view.php?id=12&lang=en.

gain new insights, for example when it comes to the behaviour of customers or target groups. Resilient big data analyses can be a valuable foundation for strategic decisions.

Cloud services, apps, and mobile solutions

With cloud computing, software applications such as apps are not installed locally on a PC or in a network but are instead made available via the internet. For the end user it is irrelevant where precisely the hardware or software they are using is located – it is simply somewhere in the 'cloud'. Servers, databanks, data storage, networks, software etc. are provided in the background.

All that is required to use them is internet access. Many users are not even aware that they are using cloud computing solutions, and yet these are employed in most areas – for example when sending emails via an online service provider, when editing documents, when streaming films, TV shows, or music, when gaming online, or when saving photos and other data.

Cloud computing is an important building block of digital transformation in any organisation. For many small organisations, the journey away from local hardware and software solutions towards cloud applications is one of the most important first steps in their digital transformation. Although working in the cloud is already commonplace for many organisations, others really need to catch up in this area.

Cloud services offer faster and more efficient services, reduce the costs of managing and maintaining IT systems, improve internal processes, make quicker decisions possible, and improve communication with customers or within the team.

These advantages are only effective, however, if INCLUDE leaders, together with all those involved, ensure that when introducing new cloud solutions, the transitional phase is well moderated and accompanied. There is otherwise a danger of some colleagues working very enthusiastically with new applications such as Microsoft Teams or Slack, for example, whilst others continue to simply communicate via email. Such a situation is the opposite of a successful digital transformation.

Individual manufacture and 3D printing

Individual or customer-specific manufacture means that a unique product is designed or developed for a single customer on demand. It is in contrast to mass production, where identical products are created in large quantities. Companies also continue to produce large quantities of a product with individual manufacture, but they can adapt the design so that a unique product can be created for any given customer.

Customers thereby have the advantage of not only receiving an individual product, but also of benefitting from lower production costs. With ground-breaking technologies such as 3D printing, individual models or objects can be manufactured directly based on digital plans.

With 3D printing (also described as additive manufacturing), three-dimensional objects can be manufactured in a computer-controlled way. 3D printers have not only been used for the past few years in industry for manufacturing prototypes and end products but have also become affordable for smaller companies and even private users.

Certain processes such as the manufacture of prototypes or inventory management can be revolutionised through 3D printing. Thanks to 3D printing it is no longer necessary to fill large warehouses with extra replacement parts since the company can produce replacement parts according to demand. 3D printing makes it possible to develop additive manufacturing processes to process raw materials into new products and at the same time to reduce waste. By using 3D printers, companies can also test new and better products and bring them to the market by making the necessary adjustments based on customer feedback.

3D printing's fields of application go far beyond the manufacturing industry, meaning that organisations and companies should also look at it – even if this is an area that may seem to be less relevant to them at first glance. Here are some examples: prostheses for the health and medical sector; practical training in vocational colleges; in the socio-cultural sector, for example when preserving or restoring cultural assets; the manufacture of products in the craft sector that can only be created with difficulty using traditional methods with conventional tools or by hand.

Internet of things (IoT) and wearables

The term 'internet of things' (IoT) refers to a network of physical objects, or 'things', in which electronics, software, sensors etc., and communication technology are embedded so that connections and data exchange are possible between these objects.

The internet of things is a system of clearly identifiable, linked data handling devices, mechanical or digital machines, objects, animals or people, between which data can be transferred with the help of a network without requiring human-to-human or human-to-computer interaction. A 'thing' in the internet of things could be a human with an implanted heart monitor, an agricultural farm animal with a biochip transponder, a car with integrated tyre pressure sensors, or a natural or artificial object of choice that has been assigned an IP address and that can transfer data via a network. Almost every physical object can be transformed into an IoT device and can be monitored as long as an internet connection can be created with this object.

Wearables (also referred to as wearable technology), belong to the most well-known IoT devices. The first wearables came at the start of the new millennium in connection with Bluetooth technology. The offer was initially restricted only to headphones and to communication between telephones and computers. Today, wearables send and receive incredibly diverse data. They often offer functions for telephone conversations, sending text messages, and notifications from social media and apps.

Without a doubt, wearables will be able to exchange far greater and more complex data in the not-too-distant future. These small devices are already equipped with security and identification functions – something that is greatly significant in a professional environment. Health and fitness wearables can collect biometric data such as heart rates, level of perspiration, and oxygen levels in the blood. Smartwatches are currently the most common wearables with which messages can be sent and received, but there are also already smart pieces of jewellery and clothing with the same array of functions.

For INCLUDE leaders, IoT and wearables are an opportunity and a challenge at the same time. On the plus side, they include the opportunity of making better decisions by using the data that IoT applications supply. On the other hand, the responsible use of personal data that wearables in particular provide is a challenge that leaders will have to increasingly face up to in the future.

Artificial Intelligence (AI)

Artificial intelligence (AI) is subsection of IT that focuses on the developing intelligent machines with behavioural and reaction patterns that are similar to humans.

HAI software is used today to generate and analyse suggestions, as well as to make decisions based on data which would be too ‘large’ or complex for humans to process. The outcomes form an important basis for various sectors: information management, the health sector, biosciences, data analyses, digital transformation, security (cyber security and other areas), various user applications, intelligent next generation building technology, proactive maintenance, robotics, and much more.

AI is sometimes used in combination with big data and real-time analyses (see above) to make intelligent decisions about the behaviour of users or machines.

Machine learning (ML) is a subsection of artificial intelligence. Computers are used here to behave like humans and to learn on their own. To this end, the system is fed with data and information in the form of observations and interactions from the real world. Software applications can make more precise predictions about the expected outcomes through ML without having to be programmed for this.

The possibilities for using AI currently seem to be limitless, so that INCLUDE leaders should develop a basic understanding of it. At the same time, it is right to have a certain amount

of scepticism about each new AI application. Responsible leaders will be supported in the future by AI but will continue to be responsible for their decisions and will not transfer this responsibility to machines if they are not absolutely certain that this would be appropriate.

Augmented reality (AR) and virtual reality (VR)

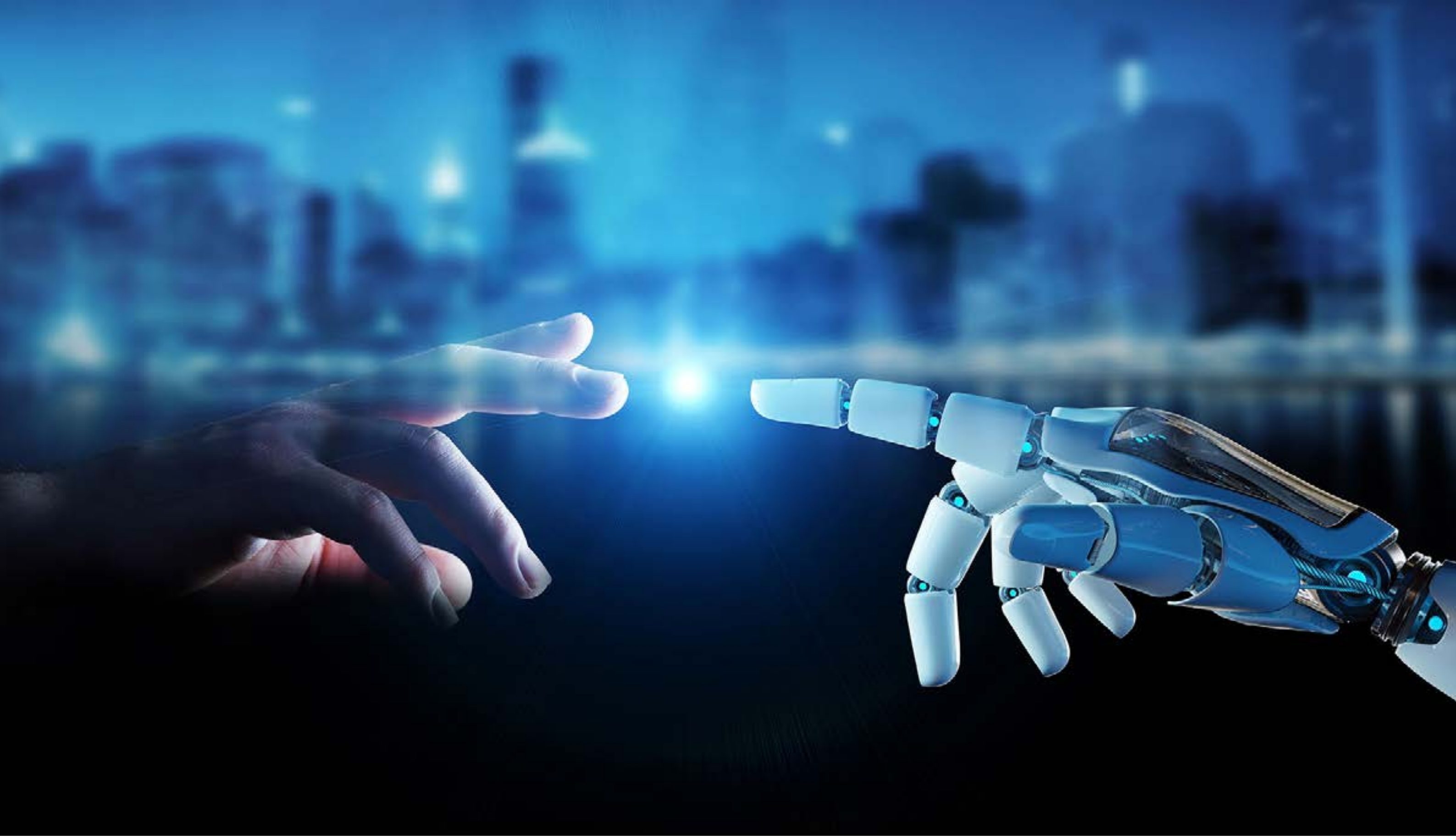
Augmented reality (AR) is a technology which shows digital objects in real time by overlaying them on a real background. With this type of interactive environment based on reality, the perception of the real world is augmented with computer-generated insertions, sounds, texts, and other effects.

Virtual reality (VR) is the introduction of computer technology to create a simulated environment. Users dive into 3D worlds and can interact with them, rather than ‘simply’ watching them on a 2D screen.

This means that you are experiencing a completely virtual world in virtual reality. In augmented reality, by contrast, virtual elements are blended with the real environment, expanding and supporting it with virtual information. This often has the goal of providing help in everyday situations.

Since augmented reality and virtual reality connect the physical and the digital world with each other, they offer enormous potential to companies and organisations. AR and VR can be used in the health sector and in medicine, in marketing and advertising, in the education sector, in sales and e-commerce, at events and conferences etc.

In the area of leadership, VR applications can lead to physically separated teams, for example, being able to meet and work together in a virtual environment. People are no longer sitting in front of their screen and watching their colleagues as a little image but are all interacting with each other in a virtual environment. This new method of collaboration doesn’t only offer leaders numerous ways of interacting.



Robotics and drones

Robots and robotic process automation (RPA) have already been used for several years. In industry, for example, robots are employed in manufacture. Robotic process automation (RPA), by contrast, has been focussed on less, but is considered to be the 'secret weapon' of digital transformation. RPA refers to software that can easily be programmed for simple tasks and thereby mimics human behaviour. These so-called software robots can be used in organisations to process transactions, edit data, prompt reactions, and communicate with other digital systems.

The software robots that are used for RPA are generally programmed by the employees who will use them (where necessary with the help of programmers). These programs can be taught, for example, to send welcome messages, fill out forms or check them for their completeness, update a table with deposited data, fill out invoices, and so on. In other words, RPA is designed to take over repetitive, simple tasks and to relieve your employees.

Drones usually refer to unmanned aircraft, but the term can be used more generally to include more or less autonomous land and water vehicles. Drones don't simply take on automatised deliveries but are also being used in many sectors as a powerful tool for collecting data. Other areas of implementation include the transport of replacement parts, comestibles, smaller cargo from the coast to larger vessels on high sea etc.

Digital customer experience (DCX) and social media

Digital customer experience (DCX) refers to every customer experience that takes place on a digital interface – in other words on a computer, tablet, or smartphone. This is the case, for example, when a customer researches a product on the internet and then finds a local shop with an app and searches for technical background information on their smartphone.

As a result of digital transformation, many organisations and companies must revise their business models and adapt to the market's latest events. Consumer behaviour has also changed radically through digital technologies: many consumers prefer automatised self-service functions and find out more about their favourite brands online.

Digital customer experience (DCX) is a process that is just as comprehensive and focussed on customers as non-digital customer experience. For customers, the difference between digital and non-digital interaction is therefore not important. What matters most is their entire experience with a brand, company, organisation, or service – it is secondary whether the interaction primarily occurred digitally or in person.

It is a fact that customer experience as a whole is decisive both for the future growth and for the current success of a company or organisation. The comprehensive and thoroughgoing contentment of your customers or your target group is very important for their connection and loyalty, for recommendations through word of mouth, for acquisitions etc. In addition to this, a good DCX strategy can lead to fewer complaints, for example. With the right tools, employees can process all enquiries in a uniform and professional way, regardless of the means of communication used by your customers. In this way, productivity and staff retention can be increased and duplicate work avoided. DCX is about more than 'just' professionally managing your social media channels. It also offers many leaders numerous possibilities, for example for optimising internal organisational processes together with their team to satisfy both their customers and their employees.

Blockchain technology

A blockchain is a digital transaction or cash register that makes it possible to save data worldwide on thousands of servers and, at the same time, for every member of the network to display the entries of virtually everyone else in almost real time (transparency). A blockchain can be programmed to not only display financial transactions such as crypto currencies but also effectively anything valuable. Data in a blockchain (i.e., in a chain of data blocks) can effectively not be manipulated. Once recorded, the data in a particular block can no longer be retrospectively changed without changing all following blocks.

Until now, blockchain technology has been used for payment and money transfers; smart contracts where the conditions of the agreement between buyers and sellers, for example, can be directly entered into lines of code; and the documentation of a delivery chain.

In summary, we can say that blockchain is a technology that enables safe and anonymous transactions. There are two primary areas of application: 1. data security (trust) and 2. Recording virtually anything that is valuable (history).

Through the concentration on cryptocurrency, blockchain technology has received rather one-sided attention. There are surprises awaiting those who can disentangle themselves from this use of blockchain technology which, while interesting, is not the only use for this technology.

Cyber security

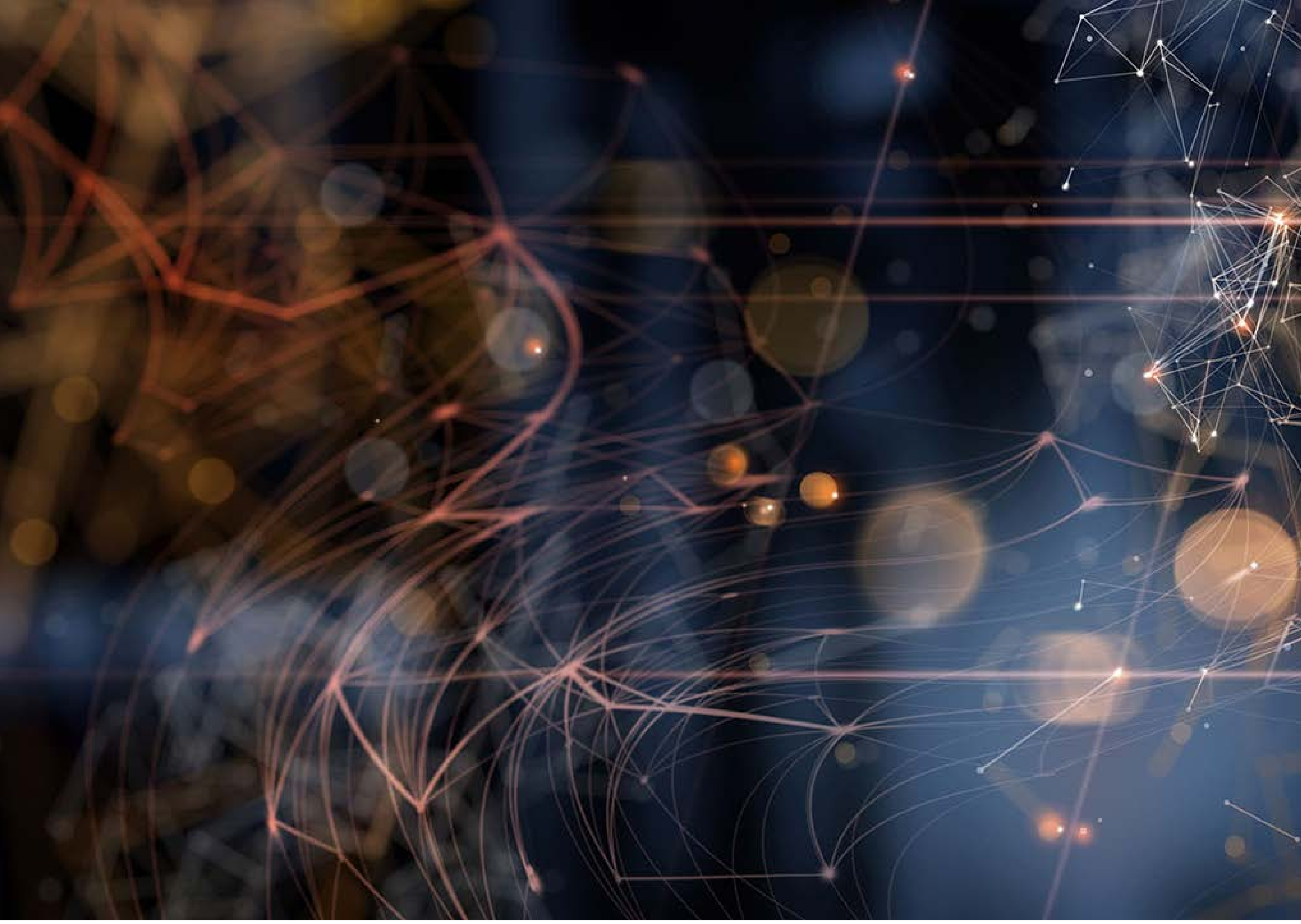
The area of cybersecurity deals with one of the greatest challenges that comes with the technological developments of the digital age such as internet of things (IoT) or cloud services (see above). It is an area that no organisation can avoid to ignore.

The topic of cybersecurity covers the protection of systems connected by the internet from cyberattacks, including hardware, software, and data. The main task in the area of cybersecurity is the protection of information and systems from cyberthreats such as malware, phishing, spear phishing, trojan horses, data protection violations etc.

Organisations and companies of every size must be able to react and recover from cyberattacks if they are to offer their products or services without interruption. A cyberattack can be aimed at a company's information, for example its customer lists, customer databases, financial information, product designs or manufacturing processes, IT-based services, or IT equipment.

The goal must be to attain an appropriate level of cyber resilience. Cyber resilience is an organisation's ability to prepare for, react to, and recover from cyberattacks. This helps to protect against cyber risks, defend against attacks, limit the extent of an attack, and ensure the organisation's survival despite an attack.

Those using a digital device today – in other words, everyone – must regularly think about the topic of cybersecurity. The topic should therefore rank very highly on every leader's agenda. To be able to avoid mistakes, leaders and employees should be constantly trained and informed about new developments in the area of IT security. Bear in mind: regular (even short) training courses are more important that one-off qualifications.



Digital age – using opportunities and encountering challenges

With the ten technological developments introduced above you have a good basis for driving your organisation's development in the digital age forward. This is one of the very most important leadership tasks. You and your team must meet the requirements in the digital age for your organisation to keep technologically up to date. Amongst other things, this means that most organisations should focus in detail on their business model and the necessary changes to this business model.

As a leader, you will need an idea of how you will go from your current business model to a new business model that is adapted to digital change. It is all about boldly seizing the opportunities that arise for almost all organisations, whilst at the same time appropriately responding to the risks that digital change entails. It works best if you integrate this process of the ongoing development of your business model with the ten INCLUDE steps. The extent to which this is advisable depends on the specific state of digital transformation in your organisation. A tool developed specifically for this task is made available to you in the 'digital transformation tool' (see chapter 6). If you believe, for example, that your organisation is still at the very beginning then using the 'digital transformation tool' offers you a good possibility of how to start.

The 'digital transformation tool' will take you through your organisation's process of digital transformation one step at a time. Work on a new business model comprises four phases: the initial phase where you will meet the necessary requirements, the phase of current state analysis, the phase of strategy development, and the implementation phase. In all four phases specific learning, working, and planning materials for organisational change,

for example on the topics of change or project management, as well as key analytical tools such as SWOT or PESTLE analysis, have been made available to you.

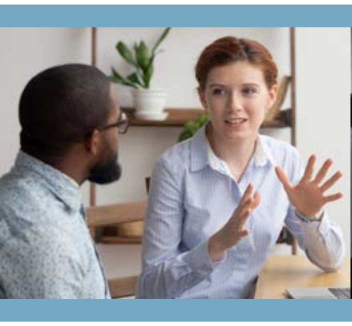
The 'digital transformation tool' is an instrument that will help you expand your knowledge about your organisation's process of digitalisation. With the 'digital transformation tool' you can use this newly gained knowledge and integrate it directly into your INCLUDE process of development.

The 'digital transformation tool' is particularly effective if you use in in phases 1 and 6, as well as in phases 3 and 8 of the INCLUDE process (cf. chapter 4). In phases 1 and 6 (preparation) you as a leader or in your entire organisation can gain an overview of the ten most important technological developments that have already been described in the previous section. In addition to this there is a short online quick check, which is also part of the 'digital transformation tool', to help you gain awareness for your organisation's current position on their journey towards digital transformation. In phases 3 and 8 (learning, testing, and trying), you as a leader or the entire team together can work on a strategic reorientation of your organisation. When this process occurs hand in hand with the trial of new INCLUDE methods of decision-making that enable better collaboration within your organisation, for example, two things will be driven forward at the same time: your organisation's internal processes and structures will run more smoothly and in a more self-organised way, and you will make an offer to your customers or target groups that they genuinely ask for or need in the digital age.


START


08

How to Prepare and conduct an INCLUDE Training Course?




Useful information to get started

In this chapter you will find guidance and tips on preparing and conducting workshops on the topic of 'Inclusive Leadership in the Digital Age'. We will present two workshop programmes that you can conduct both online and in a face-to-face setting: a one-day workshop and a two-day workshop.

We assume that you are experienced trainers who have general knowledge and the usual skills of trainers for online and/or face-to-face training and can plan and conduct workshops. In this chapter we will therefore focus exclusively on the training content of INCLUDE and its characteristics.

Designing INCLUDE workshops

You can use the model workshops as a guide and conduct the training according to the templates. You can also take the models as inspiration to design your own training and use other tools presented in this manual.

When deviating from the presented workshop models in your training design, keep in mind the objectives you are pursuing with your workshop and the needs of your target group. At the beginning of each INCLUDE tool description in this handbook you will find information on the practical benefits of the tool. This will help you to easily create well-designed and INCLUDE-tailored trainings.

Always plan an introduction to INCLUDE, cover the 5 INCLUDE development areas and introduce the INCLUDE process model. Close your workshop with an individual action plan for the participants and the next steps on their way to more inclusive leadership..

INCLUDE offline or online?

Depending on the options open to you, you can hold one-day or multi-day INCLUDE workshops - online or face-to-face. If you decide to hold an online workshop, we recommend that you look at the tools

'Remote Work' and 'How to conduct Online Meetings' in chapter 6 of this manual. You will find inspiration about online applications that can lend variety to your workshop.

Although many are now practised in remote work and online learning, it cannot be denied that face-to-face exchange - especially in the field of self-awareness - cannot be completely replaced by an online alternative. Think about whether a combination of online and offline makes sense for you.

Scheduling, group size and setting

The topic 'Inclusive Leadership in the digital Age' involves a process of personal development. You should therefore plan more time for exercises and exchange with groups who have little or no experience of this topic.

The model workshops are designed for a group of up to 12 participants. If there are more participants, you should ask another trainer to support you. Some exercises can then be done in parallel. Also, bear in mind that as the number of participants increases you will need to allow more time for discussion and review of their results.

According to the INCLUDE approach, participants should sit in a circle during face-to-face workshops. In this way, you are not only conveying that the meeting is being held at eye level through the content, but also through the setting.

The two model workshops do not specify the number of breaks and their length. Plan these inclusively with the group.

Handouts

Due to the complexity of the subject matter, we recommend that the INCLUDE manual be made digitally available to participants before the workshop. This way, each participant can bring a copy or the material digitally, depending on their individual needs.

Learning objectives

The model workshops are designed to meet the needs of people who want to lead inclusively and are looking for support in leading teams and organisations in the digital age. They have the following objectives in terms of providing knowledge, skills, and attitudes of inclusive leaders. The intensity of the workshop will vary depending on whether you choose a one-day or two-day format.

Knowledge: Participants ...

- will know what inclusive leadership is.
- will be aware of working conditions in the digital age and know why inclusive leadership is a possible answer to these challenges.
- will be familiar with the INCLUDE model and the 5 areas of INCLUDE: leaders, people, structure, processes, technology.
- Will know how to integrate inclusive leadership into their daily work.

Skills: Participants ...

- will be able to improve their skills in leading inclusively, one step at a time.
- will be able to apply at least one INCLUDE tool from the areas of leader, people, structure, process, and technology.

Attitude: The participants ...

- will have experienced inclusive leadership according to INCLUDE and will have identified approaches for their own daily work.
- will understand their own leadership style better and will be open to its ongoing development.
- will be open to responding inclusively to changing working conditions in the digital age.
- will be ready to create their personal development plan as an inclusive leader.

Checklist when preparing an INCLUDE workshop

The following checklist will support you when preparing your INCLUDE training.

Activities	Yes	Not yet
Knowledge about INCLUDE • Are you familiar with the INCLUDE model of inclusive leadership? • Do you know what the 5 INCLUDE areas of development are, and can you explain them? • Can you outline why inclusive leadership is an answer to the challenges of the digital age? • Do you know and understand the INCLUDE tools that you will present during training? • Have you anticipated possible questions, objections or doubts from the participants and thought about how to respond to them?		
Prior knowledge of the participants and their needs • Do you know who your participants are? • Do you know the participants‘ knowledge of inclusive leadership? • Do you know how the participants understand inclusive leadership? • Do you know the participants‘ experiences of leadership? • If it is an in-house training: Do you know the training needs of the group and their expectations? Have you clarified their expectations with the client?		
Content of the INCLUDE workshop • Does your workshop include ◦ an introduction to INCLUDE,		

◦ the INCLUDE process model, ◦ at least one tool* from each INCLUDE area of development, ◦ an action plan for the participants' individual development after the workshop? • Does the selection of INCLUDE tools meet the needs of the participants? • Are the selected INCLUDE tools useful for the participants, can they apply them in their workplace after the workshop? * You find detailed information on each INCLUDE tool in the description of the tools in chapter 6 of this manual. From this information you can derive the material you need to prepare for the workshop		
Procedure of the INCLUDE workshop • Is your schedule well thought out and feasible? • Have you planned the best possible implementation? For example, will you host a one-day workshop over two half days or on one full day? • Is the physical space/online applications adequate for the implementation of the workshop? • Have you planned enough breaks? • Have you planned icebreakers and energisers?		
Training skills • Are you confident about your training skills to conduct an INCLUDE training? • Have you already practiced the tools you will use during the training? • Have you adapted tools and, where necessary, handouts for your training? • If you are running an online training: are the participants familiar with digital tools?		
Your INCLUDE attitude • Have you internalised the INCLUDE approach? • Are you willing to learn and develop with the participants in the spirit of INCLUDE? • Do you have the courage and confidence to share your own leadership experiences and set a good example? • Are you prepared to meet participants at eye level? • Do you take care to include all participants and avoid exclusion during the training? • Are you willing to deliver the content in a way that allows participants to develop?		

Model for a one-day INCLUDE workshop

The following model for a one-day INCLUDE workshop is designed for two half days. The workshop can also be conducted in one day, although you should then shorten the content at some points.

The workshop covers the following topics:

- Introduction
- Inclusive leadership – an introduction to INCLUDE
- INCLUDE development area 'leader': tool 'Life Positions'
- INCLUDE development area 'technology': 'digital transformation tool'
- INCLUDE development area 'process': tool 'Team Canvas'
- INCLUDE development area 'structure': tool 'Golden Circle'
- INCLUDE development area 'people': Tool 'Discounting'
- The INCLUDE process model
- Developing an action plan - leading inclusively step by step
- Conclusion

First half day of a one-day INCLUDE workshop

Introduction	Content

45 minutes
 	
Objectives
• To build relationships with and between the participants.
• To jointly establish rules for (technical and) interpersonal cooperation during the workshop.
• To get to know the needs and motivation of the participants.
	20 minutes
	• Welcome the participants.
	• Ask the participants to introduce themselves by name and share an experience of leadership.
	• Introduce the workshop objectives and programme.
	
	25 minutes
	• Exercise 'Hopes and Fears'
	  ◦ Write two topics on a (virtual) pin board: 1) Hopes and 2) Fears.
	  ◦ Ask participants to share in pairs their hopes and fears about the INCLUDE workshop, write their result on (virtual) cards, and then put these cards on the corresponding place on the pin board. Any number of cards can be created.
	  ◦ When the participants have finished their work in pairs, summarise the information on the cards together.
	  ◦ Ask: What hopes and fears do you share?
	  ◦ Treat the hopes as expectations of the group. Address them by showing which ones will be dealt with in the training.
	• Work out rules of cooperation together, taking the participants' hopes and fears into account.

Inclusive Leadership – an introduction to INCLUDE	**Content**
75 minutes **Objectives** • To address the changing framework conditions of the working world in the digital age. • To know what inclusive leadership is in terms of INCLUDE. • To recognise why inclusive leadership is a possible answer to the challenges of the digital age. • To be familiar with the INCLUDE approach.	30 minutes • Exercise 'Challenges for leaders in the digital age'. ◦ Ask participants to discuss in pairs the challenges they face as leaders in the digital age, write their findings on (virtual) cards, and then put these cards on the whiteboard. Any number of cards can be created. ◦ When the participants have finished their work in pairs, summarise the information on the cards. Add some information to the participants' results from the INCLUDE handout 'Foundations for Leaders and Everyone who Wants to Become One' about the new conditions shaping the working world in the digital age. ◦ Ask: What challenges do you share? What do these challenges tell us about our group?
	45 minutes • Introduction to the INCLUDE approach on inclusive leadership in the digital age. ◦ Ask each person to think of 4 words that they think best describe inclusive leadership. Ask everyone to write each of the words on a card and pin them to a pinboard or write them down in an online tool (e.g., mentimeter) to create a shared word cloud. ◦ Afterwards, explain the 5 areas of development on the way to an inclusive leadership style in line with INCLUDE. When discussing each INCLUDE development area, ask participants to identify which of the previously listed challenges applies to which INCLUDE development area. ◦ After participants have heard more about inclusive leadership in terms of the INCLUDE approach, ask them again to create a word cloud focusing on what they heard and identified during the presentation. Compare and discuss the two results with the group.

INCLUDE Development Area 'Leader'

Tool: 'Life Positions'

to encourage self-awareness

45 minutes

Objectives

- To learn about and apply an INCLUDE tool out of the development area 'leader'.
- To recognise the impact of unconscious assumptions on the trajectory and outcome of an interaction (exclusive vs. inclusive).
- Observing one's own assumptions about oneself and others and becoming familiar with the ok-ok approach.

Content

20 minutes

- Share a message with the participants based on four different assumptions:
  - Assumption 1: I am ok - You are not ok
  - Assumption 2: I am not ok - You are ok
  - Assumption 3: I am not ok - You are not ok
  - Assumption 4: I am ok - You are ok
- Discuss the following questions together or ask the participants to write the answers to the questions in the chat:
  - What emotions did the different messages trigger in you?
  - Which message was the easiest to accept and why?
  - What is the difference between the 4 messages?
- Introduce the participants to the tool 'life positions'. Add to the theoretical input by referring to the 4 messages you communicated earlier based on the 4 different assumptions.

	15 minutes • Exercise ‘Reflecting on your assumptions’ ◦ Invite participants to reflect on their preferred assumptions. Ask them to think about and analyse difficult situations in their lives: ▪ How did you think about yourself in these situations? ▪ How did you think about others? ◦ Ask participants to anonymously state which life position they have prioritised in past situations. Show the results to the group.
	10 minutes • Refer to the results of the anonymous survey and sensitise the group to the extent to which a leader‘s awareness of their own life position is helpful. • Reflect together on the following questions to raise participants‘ awareness of how to deal with different attitudes: ◦ What could we do if we are not able to see the other side as ok? ◦ What could we do if we are not able to see ourselves as ok?

INCLUDE Development Area 'Technology'	Content
Tool: 'Digital Transformation Tool' To get to know a process for jointly shaping the digital transformation of an organisation 45 minutes **Objectives** • To get to know an INCLUDE tool out of the development area 'technology'. • To understand the difference between digitalisation and digital transformation. • To be sensitised to the oppor-tunities and challenges of digital transformation. • To learn a step-by-step method for the digital transformation of organisations	45 minutes • Clarify the difference between digital trans-formation and digitalisation in a joint learning discussion with the participants. • Discuss the relevance and necessity of digital transformation in organisations. • Introduce the 'digital transformation tool' and point out its collaborative approach. • Close this learning unit by sharing and discussing the application of the tool in organisations.

INCLUDE Development Area 'Process'	Content
Tool: 'Team Canvas' to facilitate inclusive processes of collaboration 45 minutes **Objectives** • To learn about and apply an INCLUDE tool out of the area 'process'. • To familiarise with a tool that opens up the space and enables the participation of all. • To show possible ways of deve-loping a bottom-up culture.	45 minutes • Invite participants to create a 'Team Canvas' for the group in the context of the workshop. • Facilitate each area of the 'team canvas' and ask the appropriate questions. Be process-oriented and neutral. • Summarise: ◦ What did we learn from creating the 'Team Canvas'? ◦ In which areas was there a need for discussion and why? ◦ What are the benefits of 'Team Canvas' for our further work? • Discuss the possibilities of using 'Team Canvas' in different contexts of inclusive leadership in your daily work.

Summary of the first half-day	Content

15 minutes
 	
Objectives
• To increase awareness of the INCLUDE development areas and INCLUDE tools, especially the three areas of 'technology', 'leader', and 'process'.
• To check the learning progress.
	15 minutes
	• Ask the participants concluding questions to close the training, for example:
	  ◦ What do you remember from today?
	  ◦ Which topics were important for you today?
	  ◦ What will you take away from today's workshop?
	• Work with the hopes and fears you gathered at the beginning. Ask the participants: Did the workshop have an impact on them?
	• Close the workshop with an open question:
	  ◦ What would you like to apply in your daily work from today's workshop?
	  ◦ Use a method that shows the participants' decisions in a clear way, for example online with mentimeter and a 'word cloud', or in a face-to-face workshop with cards on a moderation wall.
	• Thank the group for their participation and engagement.

Second half day of a one-day INCLUDE workshop

Introduction	Content
45 minutes **Objectives** • To communicate the objectives of the workshop. • To check the learning progress. • To inspire through the participants' success stories	45 minutes • Welcome the participants. • If there are a few days between the first and second part of the one-day workshop, ask the participants to share what they have already practised from the last training. Depending on the size of the group, they can do this in small groups, in pairs or on a virtual whiteboard. • Introduce the workshop objectives and the programme.

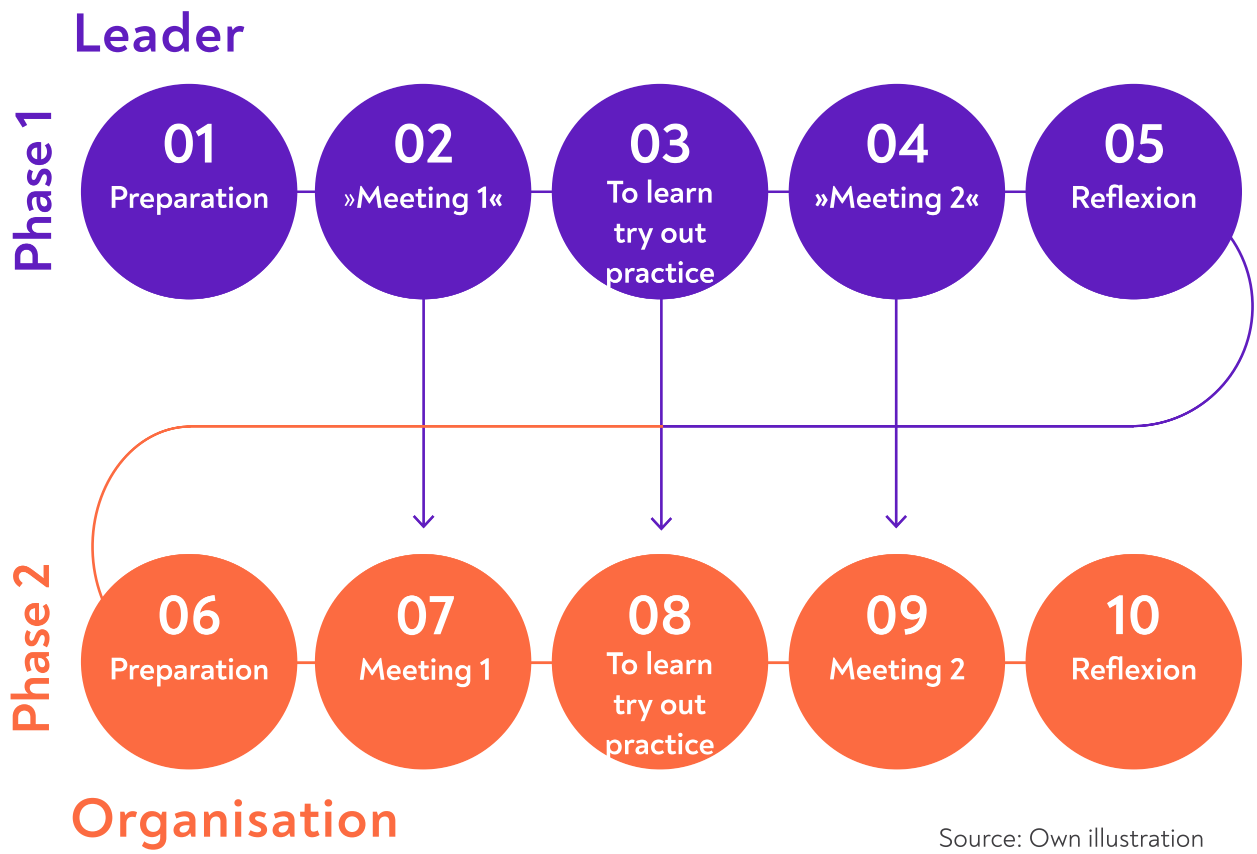
INCLUDE Development Area 'Structure'
Tool: 'Golden Circle'
as a basis for structural change
 	
60 minutes
 	
Objectives
• To apply an INCLUDE tool out of the area 'structure' in practice.
• To learn a way of communicating that has an impact on the structure of an organisation.
• To motivate the team to identify with the organisational goals and take responsibility.
	Content
	
	15 minutes
	• Share an organisation's message with the group in two different ways. Start by communicating the message by talking about the 'what', then the 'how' and finally the 'why'. Example: We are developing a new e-bike using robots to contribute to a sustainable transport structure in big cities.
	Then share the same message in a different order: First talk about the 'why', then about the 'how' and at the end about the 'what'. This could go like this: We are committed to sustainable urban transport in big cities, using robots to produce a new generation of e-bikes.
	• Discuss with the group which message is more effective and why?
	• Present the 'Golden Circle' model. Use the TED Talk by Simon Sinek, for example.
	
	30 minutes
	• Exercise 'Golden Circle'
	  ◦ Ask the participants to prepare a presentation based on the principles of the 'Golden Circle' using a real situation.
	  ◦ Then group the participants into teams of three. Ask them to give their short presentation and ask for feedback from the group: How effective was the message? What worked? What could be improved?

	15 minutes • Summarise their experiences of the exercise: ◦ What are the benefits of the 'Golden Circle'? ◦ What is challenging about using the 'Golden Circle'? ◦ How have you dealt with these challenges? • Ask the participants to reflect on their daily work and think of situations where this tool could be helpful for them. Collect the participants' ideas in writing.

INCLUDE Development Area ‘People’ Tool: ‘Discounting’ to improve cooperation 60 minutes **Objectives** • To get to know an INCLUDE tool out of the area ‘people’ and to apply it in practice. • To provide input to develop problem solving skills of individuals and teams. • To show how resistance can be identified and how solutions can be found.	**Content**
	20 minutes • Introduce the ‘Discounting’ tool and explain how it works. Use practical examples from everyday work to illustrate it. • Engage in exchange with the participants and ask them for familiar examples linked to this tool..

	30 minutes
	• Exercise ‘Discounting’
	  ◦ Group the participants into groups of three. Person A describes a challenge from his or her everyday work, person B leads the conversation and uses the questionnaire from ‘Discounting’ as a guide. Person C is an observer. The small group changes roles once or twice - depending on the time available.
	  ◦ Finally, the small group evaluates the course of the conversation, the result, and their experiences:
	    ▪ At which level of ‘discounting’ did the conversation start, and at which did it end?
	    ▪ What were the challenges?
	    ▪ Is this ‘Discounting’ tool helpful for everyday work?

	10 minutes
	• Finally, share the experiences from the exercise with the whole group.
	  ◦ Is there a need for clarification?
	  ◦ What did the small groups experience during the exercise?
	  ◦ In which situations can the tool ‘Discounting’ be helpful in everyday work?
	• Conclude with information on how the ‘Discounting’ tool can be applied in a team setting.



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The INCLUDE Process Model and its application in practice

60 minutes

Objectives

- To get to know the INCLUDE process model.
- To understand the connections between the INCLUDE process model and the INCLUDE tools.
- To identify possibilities of implementing the INCLUDE process model in daily work routines.

Content

60 minutes

- Introduce the INCLUDE process model to the participants.
- Explain the role of the leader, each individual and the team in the INCLUDE process model.
- INCLUDE in everyday work.
- Discuss with the participants the opportunities and challenges of implementing this process model.

Action Planning and Closure	Content
45 minutes **Objectives** • To motivate people to use INCLUDE as a possible answer to the leadership challenges of today. • To create a personal mini action plan. • Closure of the INCLUDE workshop.	15 minutes • Return with the participants to the challenges of leadership in the digital age that they collected at the beginning of the workshop. • Work together to recall the INCLUDE areas of development and the INCLUDE tools that were presented: Which challenges can be met with the INCLUDE approach, the INCLUDE process model and the INCLUDE tools?
	15 minutes • Ask participants to create a personal INCLUDE mini action plan: ◦ How can I implement inclusive leadership in my life? ◦ What do I want to implement? ◦ In which situations will I use the tools I have learned? ◦ What will be my first step?
	15 minutes • Recap with the participants the content of the one-day INCLUDE workshop: What will they take away? • Together with the participants, create a 'word cloud' with the most important conclusions. • Summarise the training. • Ask for feedback from the participants and end the training. • Thank the group for their participation and engagement.

Model for a two-day INCLUDE workshop

The following model for a two-day INCLUDE workshop is designed for two consecutive days. The workshop could also be held with a gap between day 1 and 2, however.

The workshop covers the following topics:

- Introduction
- Inclusive leadership – an introduction to INCLUDE
- INCLUDE Development Area Leader: Tool ‘inclusive power and authority’
- INCLUDE Development Area Structure: Tool ‘Open Space for Organisations’
- INCLUDE Development Area People: Tool ‘giving getting feedback’
- INCLUDE Development Area Process: Tool ‘Consent Decision-Making’
- INCLUDE Development Area Technology: ‘digital transformation tool’
- The INCLUDE Process Model
- Developing an action plan - leading inclusively step by step
- Conclusion

First day of a two-day INCLUDE workshop

Introduction

75 minutes

Objectives

- To build relationships with and between the participants.
- To jointly establish rules for (technical and) interpersonal cooperation during the workshop.
- To get to know the needs and motivation of the participants.

Content

30 minutes

- Welcome the participants.
- Introduce the objectives and programme of the training.
- Ask the participants to choose a picture card in the middle of the room that best represents their idea of leadership. For an online workshop, provide digital images.
- Ask participants to introduce themselves by name and share with the group the picture they have chosen and what it means to them in terms of leadership.

45 minutes

- Ask participants to rate on a scale of 1-10 how familiar they are with the idea of inclusive leadership in the digital age.
- Create 3 areas that the participants can assign themselves to: Beginner (rating 1-3), Intermediate (4-7) and Advanced (8-10). Ask the participants to choose a group according to their self-assessment.
- Ask the participants in each group to discuss their training needs and goals by answering the questions:
    - What do we want to achieve personally through this training?
    - What do we want to give of ourselves?
- Collect the participants’ expectations and willingness to contribute during the training.
- Work out together rules of cooperation that will enable participants to achieve their learning goals and to work together in an inclusive way.

Inclusive Leadership - INCLUDE

120 minutes

Objectives

- To address the changing framework conditions of the working world in the digital age.
- To know what inclusive leadership is in terms of INCLUDE.
- To recognise why inclusive leadership is a possible answer to the challenges of the digital age.
- To be familiar with the INCLUDE approach.

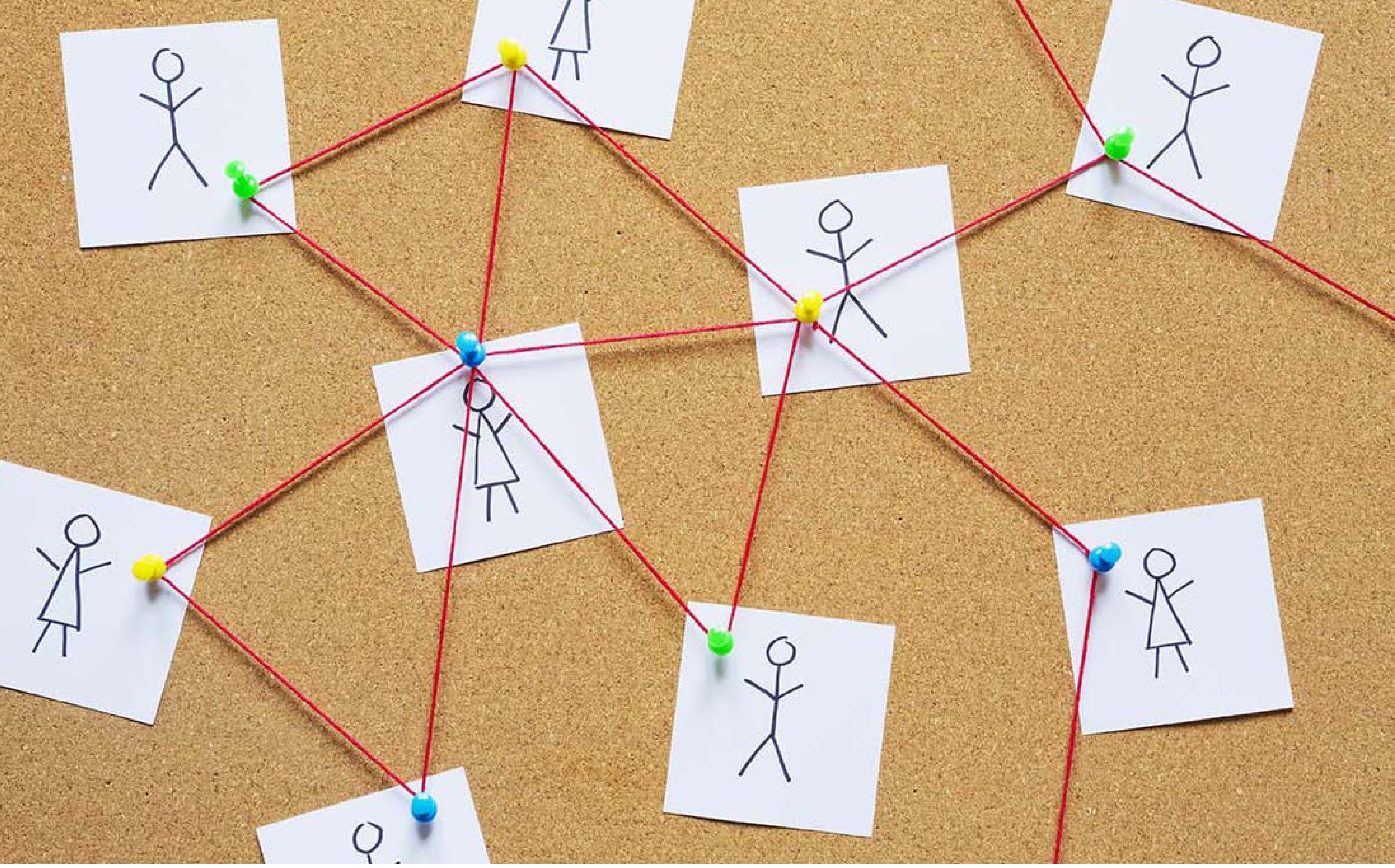
Content

60 minutes

- Exercise 'Lifeline'
  - Ask participants to work in small groups. Make sure that the group composition is as diverse as possible in terms of age and leadership experience.
    Ask participants to draw a timeline starting from the time the oldest team member remembers and ending today. Give participants the task of marking all the turning points in history that they consider important (geopolitical, economic, social, technological, etc.). Use large sheets of paper (face-to-face event) or an online whiteboard (online workshop).
  - Following this phase, ask each group to summarise the results and present them to the other participants.
  - Discuss the following questions with the participants against the background of the group results
    - How has the world changed during this time?
    - How have these turning points influenced our (working) lives?
    - What new challenges has this brought for leaders? What challenges do leaders face today?
  - Collect the challenges with the participants and document them in a prominent place for all to see. You will return to this collection during the workshop.

60 minutes

- Ask participants to share and identify examples of good practice in inclusive leadership in small groups. They should then write them down on sticky notes or virtual notes.
- Present the INCLUDE approach to inclusive leadership in the digital age. Explain in general what inclusive leadership is in terms of INCLUDE by referring to the content and conclusions of the lifeline exercises and the challenges identified by the group.
- Explain the 5 INCLUDE areas of development on the way to an inclusive leadership style.
- Now discuss the examples of good practice from the group work and ask participants to relate them to the 5 INCLUDE areas of development: 'leader', 'people', 'structure', 'process' and Tech-nology'.
  The list of good practices will give you an idea of how participants define inclusive leadership in practice. If any INCLUDE areas of development are not covered, look for examples together in the group.
- Announce that participants will learn practical tools to increase their impact in the 5 INCLUDE areas of development of 'leaders', 'people', 'struc-ture', 'process', and 'technology'.



INCLUDE Development Area 'Leader'	Content
Tool: 'Inclusive Power and Authority' To reflect on and further develop one's own understanding of power 90 minutes **Objectives** • To learn about and apply an INCLUDE tool out of the development area leader. • To learn about 4 types of power and their meaning and impact. • To improve a self-awareness of one's own understanding of power and foster the ability and willingness to use power inclusively. • To understand which methods and tools enable inclusive power and authority in daily working life.	90 minutes • Exercise 'Inclusive power and authority' Part 1 ◦ Ask participants to work in groups of three and provide them with the following questions to discuss: ▪ How have important people in your life (e.g. parents, teachers, leaders, friends) used power and established their authority? ▪ Discuss positive and negative experiences with power and authority. ◦ List examples that participants would like to share on a flip chart (face-to-face event) or whiteboard (online workshop) based on the group work. • Based on the tool 'inclusive power and authority', characterise the 4 types of power and the sources of power inherent in each style of power and the leader's actions. Discuss with the group which types of power are inclusive. • Ask participants to match the examples visualised earlier to the 4 forms of power.

- Together in the group, expand the list of activities that can be carried out by a leader under each form of power.
- Exercise „Inclusive power and authority“ Part 2
  - Ask participants to work together in pairs and give them the following questions to discuss:
    - What types of power have they experienced in the past? What was the pattern of behaviour?
    - How has this affected their leadership style?
    - Which patterns of behaviour do they want to overcome? Which ones do they want to promote?
- Afterwards, facilitate the group‘s exchange of reflections and insights.
- Refer to the INCLUDE tools presented in the workshop that help participants to use their power and authority in an inclusive way.

INCLUDE Development Area 'Structure'	**Content**

Tool: 'Open Space for Organisations'
to create organisational change together
 	
90 minutes
 	
Objectives
• To learn about and apply an INCLUDE tool out of the development area 'structure'.
• Experience the creative energy of an 'Open Space' in a simulation.
• To identify situations where 'Open Space' can be used in the participants' work.
	90 minutes
	• Communicate the basics of 'Open Space for organisations'. Focus amongst others on:
	  ◦ Rules
	  ◦ Roles
	  ◦ The 4 principles
	• Exercise „Open Space"
	You will now give the participants an experience of the beginning of an 'Open Space' event, the 'Open Space' theme collection and the 'Open Space' marketplace.
	  ◦ Facilitate the selection of a theme for a fictitious 'Open Space' conference that is 'a pressing issue' for all participants. Since the participants are connected by 'inclusive leadership', this topic is a good choice.
	  ◦ Afterwards, give the opening speech of an 'Open Space' event (approx. 15 minutes) as an 'Open Space' facilitator would give it. The speech is a core element of 'Open Space' and should be effective.
	  ◦ Then, as in a real 'Open Space' event, open the collection of themes and give the participants enough time to write down their ideas on potential workshop themes and place them on a 'themes wall'.
	  ◦ If there is time, practise the 'Open Space' marketplace phase, in which the participants agree on the agenda of an 'Open Space' conference in detail.
	• Facilitate the participants' exchange of experiences on the 'Open Space' session.
	• Discuss the feasibility and concrete application of 'Open Space' in the participants' areas of work.
	• Discuss the advantages and challenges that can be expected.

Summary of the first day	Content
15 minutes **Objectives** • To increase awareness of the INCLUDE development areas and INCLUDE tools, especially the two areas of 'leader' and 'structure'. • To check the learning progress.	15 minutes • Ask the participants concluding questions to close the training, for example: ◦ What did you discover for yourself today? ◦ What was important for you today? ◦ How do you conclude today's workshop? ◦ Think again about the needs and objectives that everyone discussed at the beginning of the workshop. Did today's experiences and information respond to them? • Thank the group for their participation and engagement.

Second day of a two-day INCLUDE workshop

Introduction	Content
20 minutes **Objectives** • To communicate the content and objectives of the workshop day. • To check the learning progress. • To consolidate the most important content of the previous day.	20 minutes • Welcome the participants. • Summarise the results of the first day and give an insight into the content and objectives of today‘s session. • Ask the participants to discuss the following questions in pairs: ◦ How will you start the second day of the work-shop? ◦ What thoughts did/do you have after yester-day‘s workshop? ◦ What is important for you today?

INCLUDE Development Area 'People'

Tool: 'Giving Getting Feedback'

To perceive the needs of others and to grow ourselves

90 minutes

Objectives

- To learn about and apply an INCLUDE tool out of the development area 'people'.
- To understand the importance of needs for goal-oriented communication.
- To gain an understanding of how 'giving and getting feedback' works in an inclusive approach.

Content

40 minutes

- Exercise 'Needs and strategies to satisfy them'
  - Using an example from life, briefly point out the difference between strategies for action and needs.
  - Stick a card with a need on each participant's back so that they cannot see which need is stuck on their back.
  - Ask the participants to walk around with the card on their back and ask the other participants what strategies do they use in their life to meet the need on the back of the participant asking the question?
  - The participants asking questions write down the strategies that their colleagues tell them. All participants should talk to at least three people.
  - In a short individual session, the participants analyse the three strategies they have written down and try to find out which need is on their back. Afterwards, the participants check their assumptions.
- Discuss the exercise in the group and come to a conclusion:
  - There are many strategies for satisfying a need. Strategies can be divisive, whereas needs are universal and unite all people.
  - When we observe another person's strategy, we cannot always tell what need is behind it.
  - To ensure effective communication, it is important to be open about one's own needs.
  - Needs are never mutually exclusive. By discovering our own needs and responding to the needs of the person we are talking to, we increase the chance of agreement and moving forward together.

	50 minutes • Exercise 'Giving and getting feedback' ◦ Ask participants to discuss the following questions in small groups: ▪ What critical feedback have you accepted in the past? ▪ What positive feedback have you rejected? ▪ Discuss what was decisive for your response. ◦ Facilitate the sharing of the results with the whole group. • Work with the group to develop criteria for acceptable feedback. • Refer to people's needs and explain the 4-step model for feedback from the INCLUDE handbook. • Briefly explain the approach of non-violent communication according to Marshall B. Rosenberg. • Finally, summarise the main points on 'giving and getting feedback' inclusively.

INCLUDE Development Area 'Process'	Content

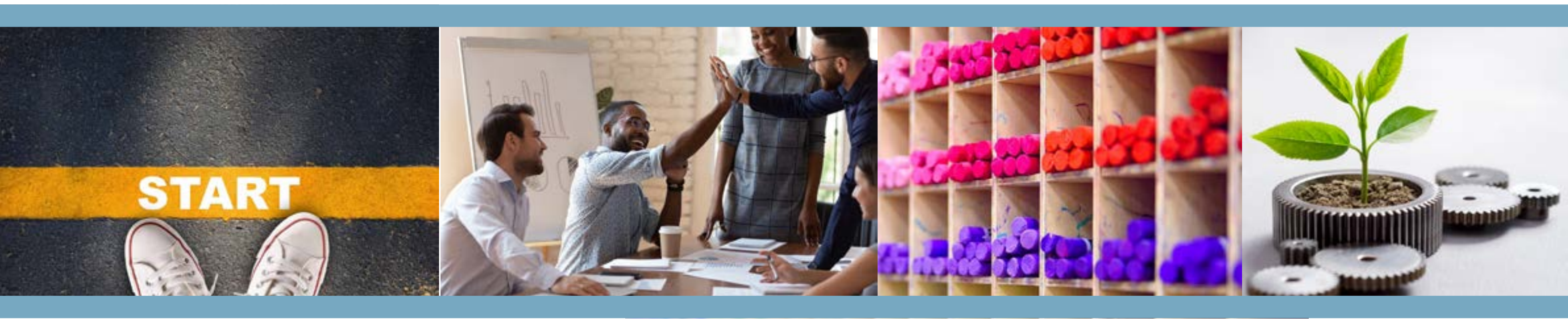
Tool: 'Consent Decision-Making'
To make decisions together and on an equal footing
 	
150 minutes
 	
Objectives
• To learn about and apply an INCLUDE tool out of the development area 'process'.
• To realise that leaders are not outvoted in an equal decision-making method.
• To recognise that inclusive decision-making processes do not have to be long and complicated.
• To become more open to and courageous about designing organisational processes in an inclusive way.
	40 minutes
	• Introduce the participants to 'Consent Decision-Making', explain the basics and refer to sociocracy.
	• Explain the process of 'Consent Decision-Making'. Go into detail about the individual steps of preparation, information rounds and opinion rounds, the integration of substantial objections, and consent.
	• Address challenges and take time to consider practical examples and questions from participants.
	
	90 minutes
	• Exercise 'Consent Decision-Making' using the 'shared flat game'
	  ◦ Ask six participants to take part in a 'Consent Decision-Making' simulation and sit at a table in a circle. The other participants observe the process. A 'Consent Decision-Making' simulation takes about 40 minutes.
	  ◦ Introduce the 'Consent Decision-Making' exercise.
	  Use the material referred to in the description of the 'Consent Decision-Making' tool in the resources section of this handbook.
	  ◦ Facilitate the first decision-making session yourself using the method 'Consent Decision-Making'. Be strict about the rules and make sure that participants are always clear which stage of 'Consent Decision-Making' they are at.
	  ◦ Once you have simulated the process 'Consent Decision-Making' together, conduct a second simulation directly afterwards using the 'shared flat game'. This time, a participant takes over as facilitator and the actors change. The observers now become actors and vice versa.

20 minutes

- Start the evaluation by sharing personal experiences:
  - How did the participants feel?
  - What did they find easy?
  - What was challenging?
- Then discuss 'Consent Decision-Making' in general.
  - What benefits can the participants see?
  - What concerns do they have?
  - In which situations can 'Consent Decision-Making' be used? When is it not useful?
  - Can the participants imagine using 'Consent Decision-Making' in their work environment?
- Summarise the participants' conclusions from this experience by asking them: What will they take away from this exercise?

INCLUDE Development Area 'Technology' Tool: 'Digital Transformation Tool' To get to know a process for jointly shaping the digital transformation of an organisation 35 minutes **Objectives** • To get to know an INCLUDE tool out of the development area 'technology'. • To understand the difference between digitalisation and digital transformation. • To be sensitised to the opportunities and challenges of digital transformation. • To learn a step-by-step method for the digital transformation of organisations.	**Content** 35 minutes • Clarify the difference between digital transformation and digitalisation in a joint learning discussion with the participants. • Discuss the relevance and necessity of digital transformation in organisations. • Introduce the 'digital transformation tool' and point out its collaborative approach. • Close this learning unit by sharing and discussing the application of the tool in organisations.
The INCLUDE Process Model and its application in practice 50 minutes **Objectives** • To get to know the INCLUDE process model. • To understand the connections between the INCLUDE process model and the INCLUDE tools. • To identify possibilities of implementing the INCLUDE process model in daily work routines.	**Content** 50 minutes • Introduce the INCLUDE process model to the participants. • Explain the role of the leader, each individual and the team in the INCLUDE process model. • Give practical tips on how to implement INCLUDE in everyday work. • Discuss with the participants the opportunities and challenges of implementing this process model.

Action Planning and Closure	Content
45 minutes **Objectives** • To motivate people to use INCLUDE as a possible answer to the leadership challenges of today. • To create a personal mini action plan. • To celebrate the jointly conducted workshop with the newly gained knowledge and insights. • Closure of the INCLUDE workshop.	15 minutes • As at the beginning of the workshop, ask participants to choose a picture card in the middle of the room that best represents their idea of inclusive leadership. In an online workshop, provide digital images. • Ask participants to share their thoughts on the picture card and, if relevant, to identify any differences from the card they chose at the beginning of the workshop. • Work together with the participants to recall key aspects of INCLUDE and to arrive at a joint conclusion.
	15 minutes • Ask participants to create a personal INCLUDE mini action plan: ◦ How can I implement inclusive leadership in my life? ◦ What do I want to implement? ◦ In which situations will I use the tools I have learned? ◦ What will be my first step
	15 minutes • Recap with the participants the content of the two-day INCLUDE workshop: What will they take away? • Give space for personal feedback using a ‘talking stick’. • Summarise the workshop. • End the workshop with good wishes for their inclusive leadership journey and thank the group for their participation and engagement.


START

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