Effective Collaboration at Any Scale

A Practical Guide for Agile and Responsive Organizations

flexible principles based free
People in organisations are looking for ways to navigate complexity, raise engagement and adapt to rapidly changing contexts, to better deliver value. There is a need for practices and guidelines that facilitate effective collaboration, enhance productivity and help transform challenges into opportunities to innovate and learn.
Artful Participation

Is my behavior in this moment the greatest contribution* I can make to the effectiveness of this collaboration?

*may include holding back, interrupting, objecting or even breaking agreements
**Four Dimensions**

**Responsiveness**
- Clarify domains
- Flow info & influence
- Respond quickly and effectively to changing contexts
- Structure org
- Link domains

**Participation**
- Focus interactions
- Build and maintain engagement and accountability
- Learn & grow
- Build collaboration

**Doing**
- Identify & distribute work
- Prioritize backlogs
- Do what needs to be done to create maximum value
- Review & improve
- Pull in work

**Agreeing**
- Clarify WHY
- Tap collective intelligence to create and evolve effective decisions
- Experiment and learn
- Create Experiments
- Good enough? Safe enough?
A Sociocracy 3.0 resource by J. Priest, L. David and J. Cumps (2017-05-03) - based on original material by Sociocracy30.org - J. Priest and B. Bockelbrink
Seven Principles

- **Transparency**
  Make all information accessible to everyone in the organization, unless there is a reason for confidentiality.

- **Continuous Improvement**
  Change incrementally to accommodate steady empirical learning.

- **Equivalence**
  Involve people in making and evolving decisions that affect them.

- **Consent**
  Raise, seek out and resolve objections to decisions and actions.

- **Accountability**
  Respond when something is needed, do what you agreed to and take ownership for the course of the organization.

- **Effectiveness**
  Devote time only to what brings you closer towards achieving your objectives.

- **Empiricism**
  Test all assumptions through experiments and continuous revision.
Delegate Influence

We delegate influence and retain overall accountability for this subdomain.

Delegator

sub Domain

Delegatee

We clarify the domain, and provide support and opportunities for development to delegates.

...takes responsibility for the domain, by keeping a role for a term, after which reselect or serving in a:

- Helping Team
- Circle
- Open Domain
Clarify Domains

A distinct area of influence, activity and decision making within an organization

Domain Description

Delegator:

D Primary Driver

Key responsibilities

Constraints
(dependencies, reporting, etc)

Resources
(budget, time, tools, privileges, etc)

Preferred qualities, skills, experience

Evaluation criteria

Review date(s)
Building Organizations

Double

Linking

Role

Helping Team

Circle

Representative

Open Domain
Types of semi-autonomous, equivalent teams

**Helping Team**
- Executes on a specific set of requirements (operations)
- Governed by their delegator
  - More or less self-organizing

**Circle**
- Self-governing
- Accountable for their own development
  - More or less self-organizing

**Open Domain**
- Invitation based
  - Those invited contribute if & when they can
  - More or less self-organizing
  - May only do operations or governance as well
Navigate Via Tension

1. Notice Tension

2. Understand Driver

3. Is it an Organizational Driver? No
   - Drop it
   Yes

4. Is it in my (our) domain? No
   - Pass to the appropriate domain
   Yes

5. Respond

Driver

The motive for responding to a situation

a.k.a. the WHY

simply described in a brief summary

explaining:

what’s happening:
  - current situation
  - effect on the org

what’s needed:
  - need of the org
  - impact of attending to that need
Qualify Objections

Does this argument reveal a reason why doing this stands in the way of a (more) effective response to an organizational driver?

Qualify Organizational Drivers

Will it help the organization if we respond to this driver? Will it lead to unintended consequences if we don't?
Describing Drivers

Our team is getting stuck in administrative matters and it’s reducing our capacity for revenue generation. We need to free up time for more billable work.

We’re expanding our operations with increasingly distributed teams and see potential to improve our approach. We need to evolve how we manage the department, to build and maintain coherence and performance as we grow.

The kitchen is a mess: there are no clean cups, the sink is full and it’s not possible to quickly grab a coffee and get back to work. We need the kitchen in a usable state so we can stay focused on our work.
Ways People Respond to Organizational Drivers

making and evolving governance decisions

(self)organizing how work will be done

doing work
Governance
(of an organization or a domain within it)
the act of setting objectives, and
making and evolving decisions that
guide people towards achieving them.

Self-Governance
People governing themselves within
the constraints of a domain.

Self-Organization
Any activity or process through which people
organize their day-to-day work without the
influence of an external agent, and within
constraints defined through governance.

Operations
doing the work and organizing day to
day activities within constraints
defined through governance.
Governance vs Operations

Driver

Is this covered by a previous decision?

NO

Will this decision govern future decisions and actions?

YES

NO

Governance Board

To decide | Agenda | Agreed

prioritize

groups make decisions in Governance Meeting

resulting in Agreements

Operations Board

To do | Work in Progress | Done

WIP limit
Organizing Work

- **Pull system for work**
- **Limit work in progress**
- **Prioritize Backlogs**
- **Retrospective**
- **Planning & Review Meetings**
Co-creation and Evolution

- Navigate Via Tension
- Describe Organizational Drivers
- Respond to Organizational Drivers
- Those Affected Decide
- Co-Create Proposals
- Proposal Forming
- Role Selection
- Driver Mapping
- Tension

- Evaluate and Evolve Agreements
- Resolve Objections
- Objection
- Consent Decision Making
Opening round

Administrative matters
- consent to last minutes
- date for next meeting
- last-minute agenda items
- consent to agenda

Agenda items
- short reports
- agreements due review

<table>
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<tr>
<th>Driver</th>
<th>Name</th>
<th>Time</th>
<th>Process</th>
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<td>15</td>
<td>Selection</td>
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Meeting Evaluation

Closing
Role Selection

Present Domain

Record Nominations

Hear Reasons

Info Gathering

Nomination Changes

Propose a Nominee

Check for Objections

Address and Resolve

Celebrate!
Proposal Forming

1. Present and consent to Driver

   "Is it clear enough?"
   "Is it relevant for us?"

2. Questions about the Driver

   "Any other info you need to know about the Driver?"

   ...answer Q's as you go...

Do we know enough about the Driver for now?
3 Record considerations as Q’s

“What questions come up for me when I start thinking about possible solutions?”

Info gathering Q’s (understanding constraints)
“Do we have a budget?”
“How many people are affected by this?”

Generative Q’s (exploring possibilities)
“What’s the simplest thing we could do?”
“How can we gather feedback?”

* Avoid solutions disguised as questions!

Where possible...
4 Answer information gathering Q’s
...to increase knowledge of constraints

5 Prioritize generative questions
6 Collect ideas

...that offer a complete solution to the driver or address specific, important considerations.

defer dialogue and sharing opinions

7 Choose tuners

Who wants to, or should be there?
Other significant contributors?

No objections!

8 Design proposal

Proposal title

- Driver
- Proposal text
- Who's accountable for what?
- Evaluation date
- Evaluation criteria
Consent

Raise, seek out and resolve objections to decisions and actions.

Objection

A reason why doing something stands in the way of (more) effective response to an organisational driver.

Objections reveal...

viable ways to improve

unintended consequences

I have a Concern

No Objection

I have a possible Objection
It's not "either, or", it's "both and more"!
Good enough for now & safe enough to try
Consent Decision Making

1. Present and Consent to Driver
   "Relevant for us to respond to?"
   "Described clearly enough?"

2. Present Proposal

3. Clarifying Questions?
   "Do you understand the proposal as it’s written?"
   Avoid "why" questions. Focus on "what do you mean?"

4. Brief Response
   "What are your thoughts and feelings about the proposal?"
   Use rounds!

A Sociocracy 3.0 resource by J. Priest, L. David and J. Cumps (v2018-03-11) - based on original material by Sociocracy30.org - J. Priest and B. Bockelbrink
5. **Any Objections?**

You can use hand signs to show your response simultaneously.

- I have a concern
- No objection
- I think I have an objection

6. **Resolve Objections**

...one at a time.

Integrate information and wisdom to improve the proposal, until there are no more objections.

7. **CELEBRATE!**

You just made an agreement!

8. **Consider Concerns**

If there is time, listen to concerns.

They may inform ways to improve the agreement, or at least record them as evaluation criteria.
Resolve Objections

1. Understand the argument

2. Qualify Objection
   If someone (partly) disagrees that the initial argument reveals an objection, treat this new argument as a possible objection to the first.

   Consider if this argument qualifies as an objection. Does anyone (partly) disagree? Please raise your hand.

   *invite people with opposing arguments to a timeboxed dialogue to synergize valid information from both sides

3. Propose amendment
   Ask the person objecting:
   Do you see a way to amend this proposal to resolve this objection?

4. Any to this amendment?
   go to step 5  Yes  No  go to step 6
5. Resolve to amendment

Find an amendment to which there are no objections

Think both / and.

Invite the people objecting to have a time-boxed conversation.

start from the beginning:
1. Listen to the argument
2. Qualify objection
3. Propose an amendment
4. Objections to amendment?

There's always an iterative next step!

6. zoom out to the whole proposal again

More to amended proposal?

start again from step 1

No

go to step 7

7. Celebrate!

You have made an agreement!

8. Consider Concerns

Considering concerns can reveal ways to further improve an agreement, if there is time.

Record concerns and monitor them.
Peer Review
- for teams or individuals -

Invite participants

Domain description & strategy

Collect appreciations...

and then

Improvement suggestions...

Co-create development plan

Pass to delegator to...

Consent to plan
Driver Mapping

- progress quickly from concept to action in self-organizing groups
- organize start-ups, kick off projects, evolve orgs

1. Why
   - are we here?
2. Who
   - ...will be impacted? (actors)
     - lose, benefit, help
   - consent to primary driver
3. What
   - ...is needed? (drivers)
     - "They need..."
     - "We need..."
   - lose, benefit, obstruct
4. How
   - ...can we respond?
     - who has expertise?
     - add names to driver cards

Inspired by Gojko Adzic's Impact Mapping
5. Identify domains
Cluster actors and/or drivers into coherent domains

6. Populate & define domains

7. Sort, prioritize, (pass), drivers & identify any others missing

8. Connect domains
Account for dependencies and link domains when helpful to flow info between them

9. What else do we need to consider to respond to the primary driver?

10. Celebrate!
Bringing in S3

How do I invite change?

Be the change

Tell the story

Invite others

Meet people where they are!

Collect & prioritize important drivers

How and where do I start?

Pull in patterns that might help

Let people choose their own pace!