



The Holacratic Experience

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Agenda

- Framing: A New Social Technology
- Tactical Meeting Simulation
- *Break*
- Governance Meeting Simulation
- Structure: Distributed Authority at Scale
- Wrap-up & Closing

Endemic Challenges in Organizations

Painful Meetings

Overwhelm

Fear **Difficulty with Change**

Unclear Decision-Making

BUREAUCRACY

Lack of Engagement

Communication Issues

Alignment Issues

Analysis Paralysis

Rigidity

Politics





A New Social Technology for Organizations

Holacracy

Holacracy is...

- ... a **social technology** for **purposeful organization**
- ... a new **power structure**, vested in a **constitution**
- ... an **integrative way** to distribute **autocratic authority**
- ... a system for **governance** and **operations**

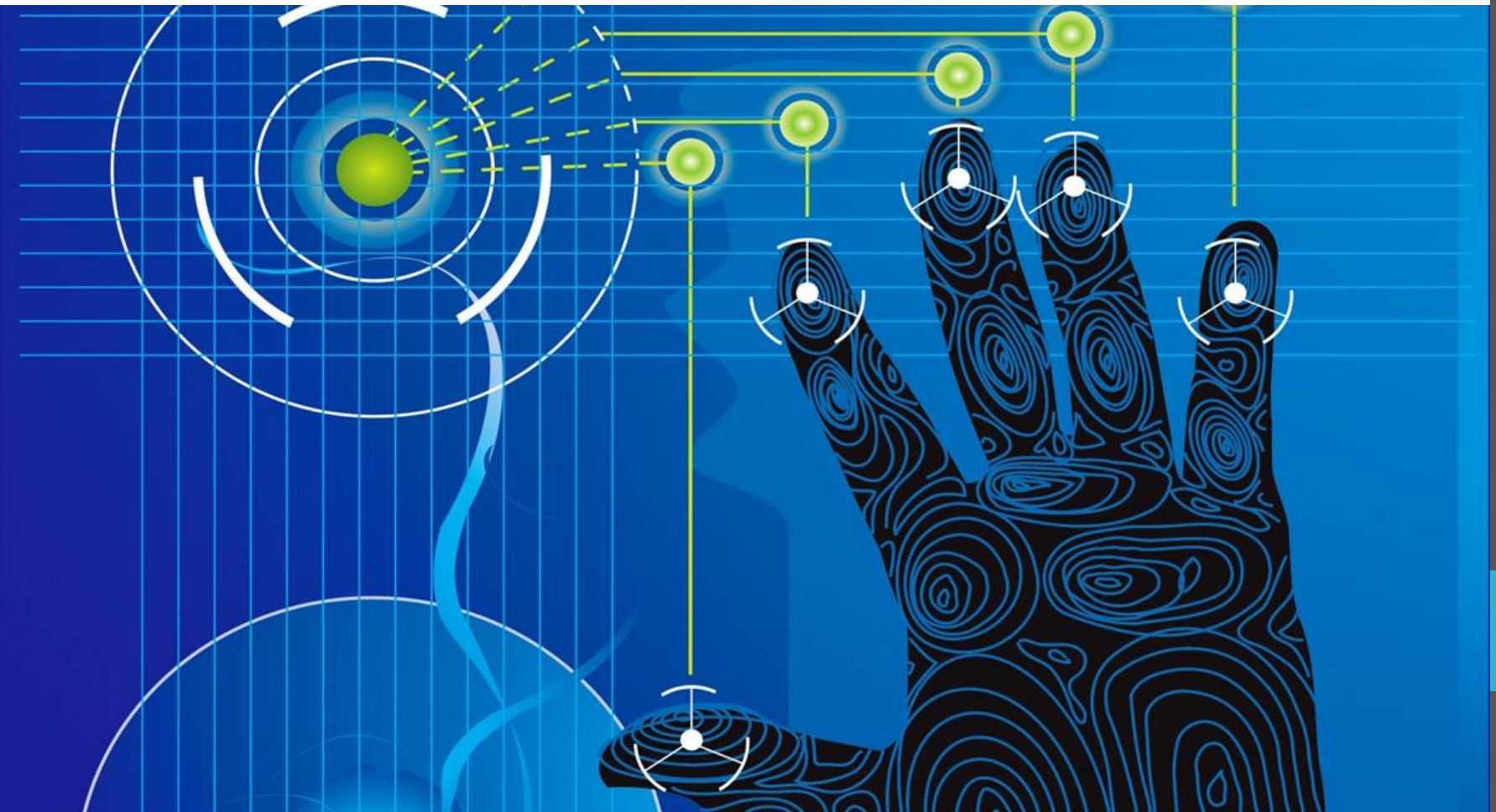




Flying with All Your Instruments...

Humans as Sensors

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





is

could be

The Power of Processing Tensions...

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

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



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



Operations vs. **Governance**

Let's Try It: Simulation Setup

Welcome to “The Better Way Company”

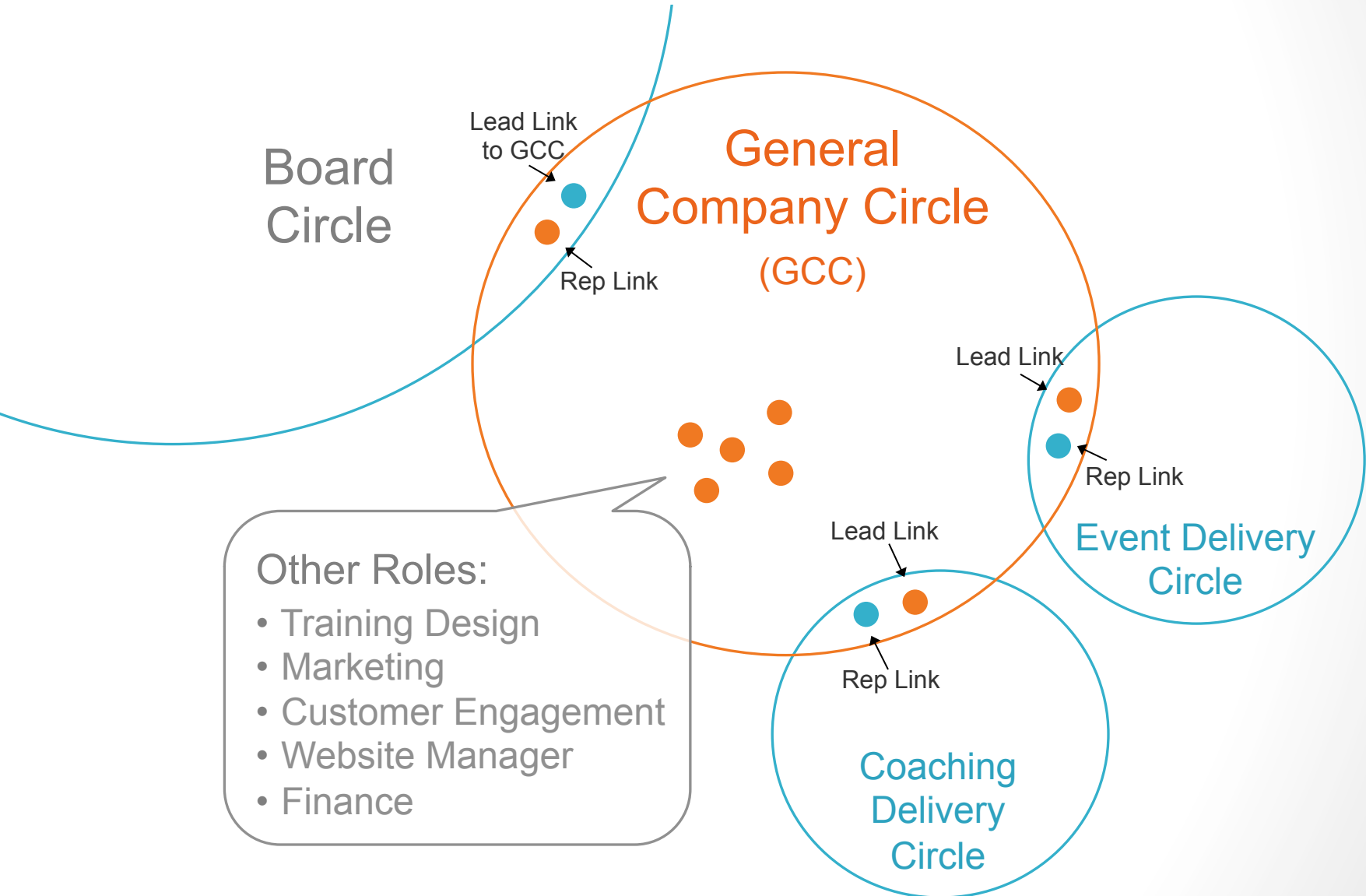
Provides training & coaching for the “Better Way” method...

The company has just adopted Holacracy...

... and there are lots of tensions to process ...



The Better Way Company



Tactical Meeting Process

Check-in Round

Checklist Review

Metrics Review

Project Updates

Triage Issues

- Issue #1
- Issue #2

Closing Round

Primary Outputs:

- Projects
- Next-Actions

Agenda Item Triage Process:

1. Facilitator: “What do you need?”
2. Agenda item owner engages others
3. Identify & assign actions & projects

Checklist

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

Metrics

	March	April	May
Website Hits <i>Website Manager</i>	8,500	9,000	
Sign-ups for Next Event <i>Event Delivery</i>	30	36	
# Coaching Clients <i>Coaching Delivery</i>	22	21	
Support Cases Handled <i>Customer Service</i>	49	51	
Revenue <i>Finance</i>	\$180k	\$150k	

Projects

Tax Returns
Filed & Paid

Finance

New Blog
Published

Marketing

New FAQ
Published

Customer service

Discussion
Forums Live

Website Manager

Advanced Training
Launched

Training Design

New Webinar
Scheduled

Marketing

New Coaches
Fully Trained

Coaching Delivery

Intro Event
redesigned

Training Design

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



Operations vs. **Governance**

Governance Meeting Process

Check-in Round

Administrative Concerns

Agenda Building

Process Agenda

- Item #1
- Item #2

Closing Round

Primary Outputs:

- Role Definitions
- Policies

Integrative Decision-Making Process:

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

Go back to Objection Round ↗

Integrative Decision-Making Process

Present Proposal

Clarifying Questions

Reaction Round

Amend and Clarify

Objection Round

Integration (if needed)

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



Governance = Organization Structure

3 definitions of “structure” for any organization:

- Formal Structure (the org chart & job descriptions)
- Extant Structure (the one actually operating)
- Requisite Structure (the natural one, “wants to be”)

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



Governance Outputs (Structure)



Role Definitions



Policies



Elections

Capturing a Requisite Structure

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

Purpose (why it exists; what it aims to manifest)

- Reveal the natural beauty of Holacracy to the world

Domain / Scope (grants control; a “property right”)

- The Organization’s Public Website
- All Social Media Accounts & Pages

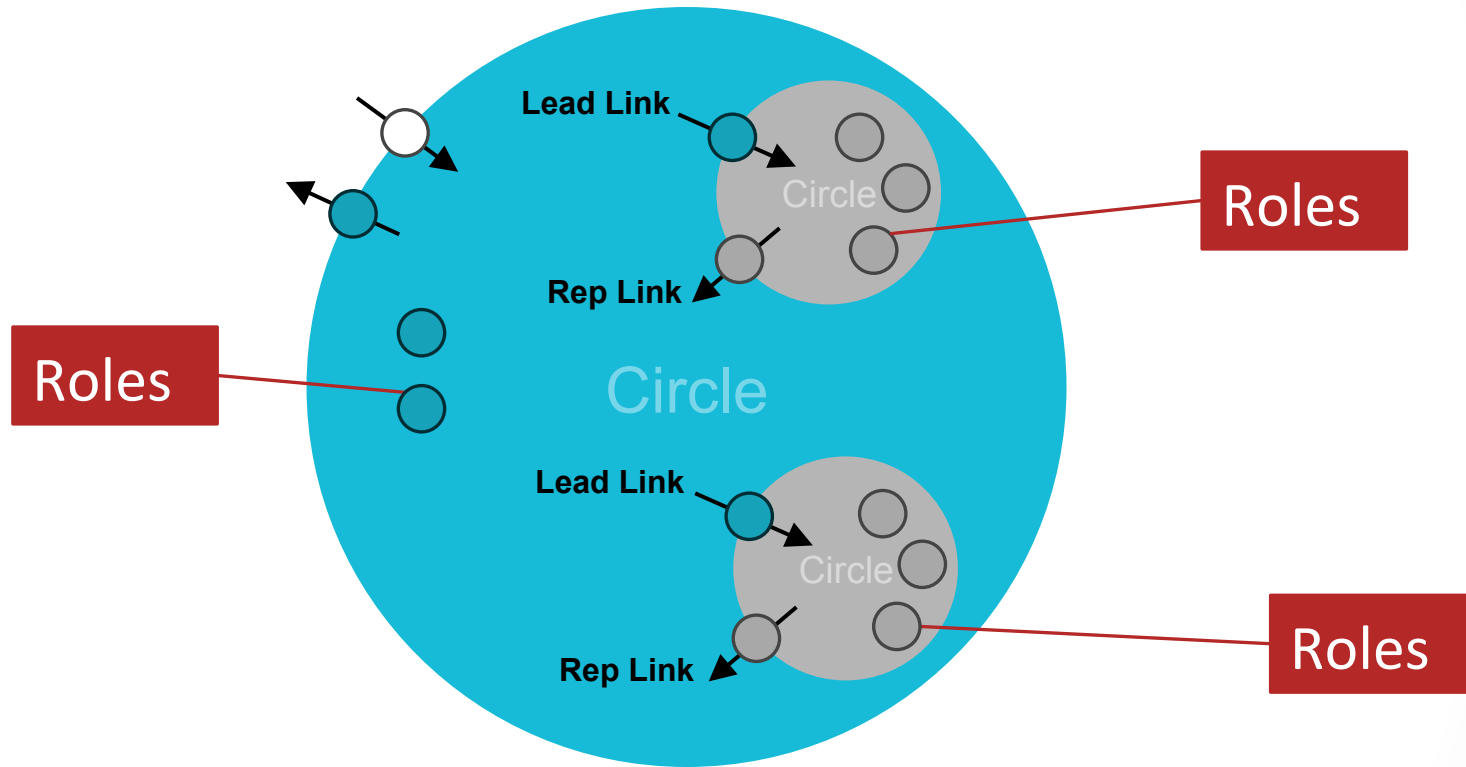


Accountabilities (defines expectations & authorities)

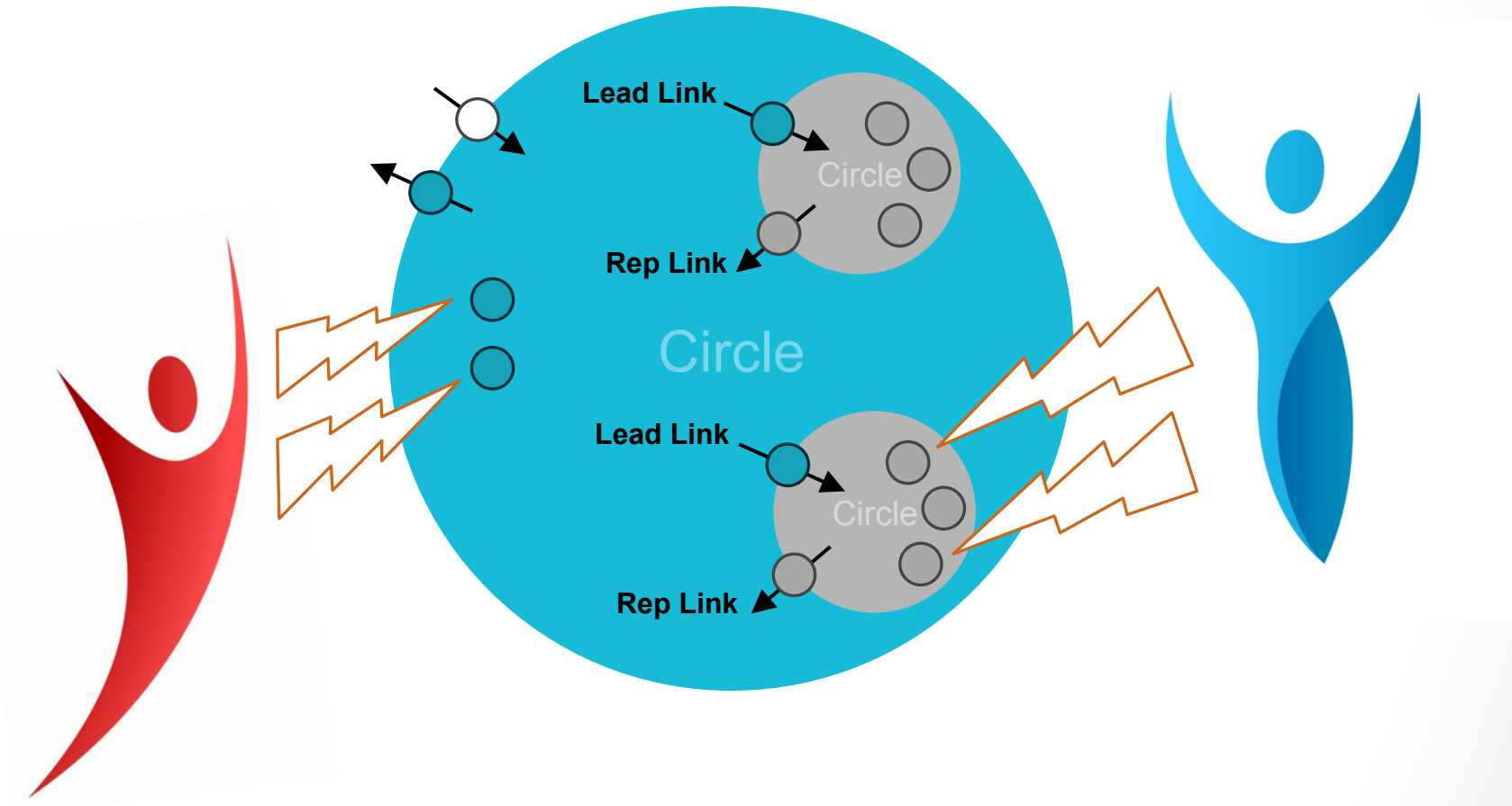
- Promoting and marketing the company’s trainings & events
- Orchestrating public speaking engagements & similar PR
- ...

Distributed Authority at Scale:

Organic Structure



Distributed Authority at Scale: Organic Structure



ACTIVITY:

Putting the Pieces Together

Review tensions of a Better Way Co role

- Pick a tension and share it with the group

Discuss: Where to process this tension?

- What governance clarity might be needed (if any)?
- What tactical action or project is needed (if any)?



Not a collective, but an entity...

The Organization



It Takes a Village to Raise an Organization...

Exquisite Organization

Exquisite, adj.: *extremely beautiful, intensely felt, highly discriminating; brought to a highly wrought condition; of consummate and delightful excellence; of any thing (good or bad, torture as well as art).*

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