

## Five core practices for operational excellence



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# Introducing myself

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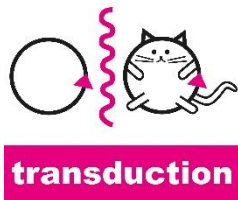
[Learn with me in the RedQuadrant tool shed](#)



[www.publicservicetransformation.org](http://www.publicservicetransformation.org)



Systems and complexity in organisation  
[www.systemspractice.org](http://www.systemspractice.org)



All the links are at [bentaylor.com](http://bentaylor.com)



# What I'll cover

- The possibilities of organisation and the shadow side
- The blue dot!
- Five core practices  
The risk of double binds, the importance of *practice*
  1. Productive conversations practices
  2. Learning practices
  3. Clarity practices
  4. Culture shaping practices
  5. Practices for good and clear intent
- Organising for human and organisational needs
- This slide deck includes all sections taken out from my conference presentation. [Reading list from slide 98](#)

## **The five core practices and how they help effective human organisation**

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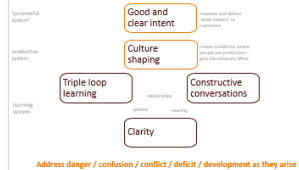
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Address danger / confusion / conflict / deficit / development as they arise

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### The RedQuadrant Way tool shed

This framework brings together a set of methods, approaches, practices, tools and frames, set out at more fully in link at bottom, particularly:

- An understanding of organisational functioning (the Stable Systems Model, outside-in demand management and operational effectiveness, strategic and adaptation capability);
- An understanding of human relationships in organisations (Barni Taly's Organic Systems Framework, systems leadership theory (along the lines of Jacquot and Macdonald et al), multiple perspectives, capabilities, and other organisational development approaches); and
- Intentional theory and method.

Colour based mentoring, action learning, online/blended learning, meta contextual approach.



<http://bit.ly/20c6bbhuhubshedsall>

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My short LinkedIn pieces are in red.  
Most recommended reading in bold.  
Minor articles and papers available in single folders at <http://www.redquadrant.org.uk/linked/>  
<http://www.redquadrant.org.uk/linked/>  
g:Shared links are to files within this folder.

For more - Systems Community of Inquiry  
[www.scoi.org.uk/](http://www.scoi.org.uk/)  
We're bringing pieces of everything interesting in systems, complexity, and culture  
at [www.systemscommunityofinquiry.com/](http://www.systemscommunityofinquiry.com/)

### RECOMMENDED READING

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# Three quotes to keep in mind

The tool for handling complexity is ORGANISATION. But our concepts of organisation belong to the much less complex old world not to the much more complex today's world: still less are they adequate to deal with the next epoch of complexification in a world of explosive change.

**Stafford Beer**

Creativity and innovation, like freedom and liberty, depend not upon the soft pedalling of organisation, but upon the development of institutions with the kind of constraint and opportunities that can enable us to live and work together harmoniously, effectively and creatively.

**Elliott Jaques**

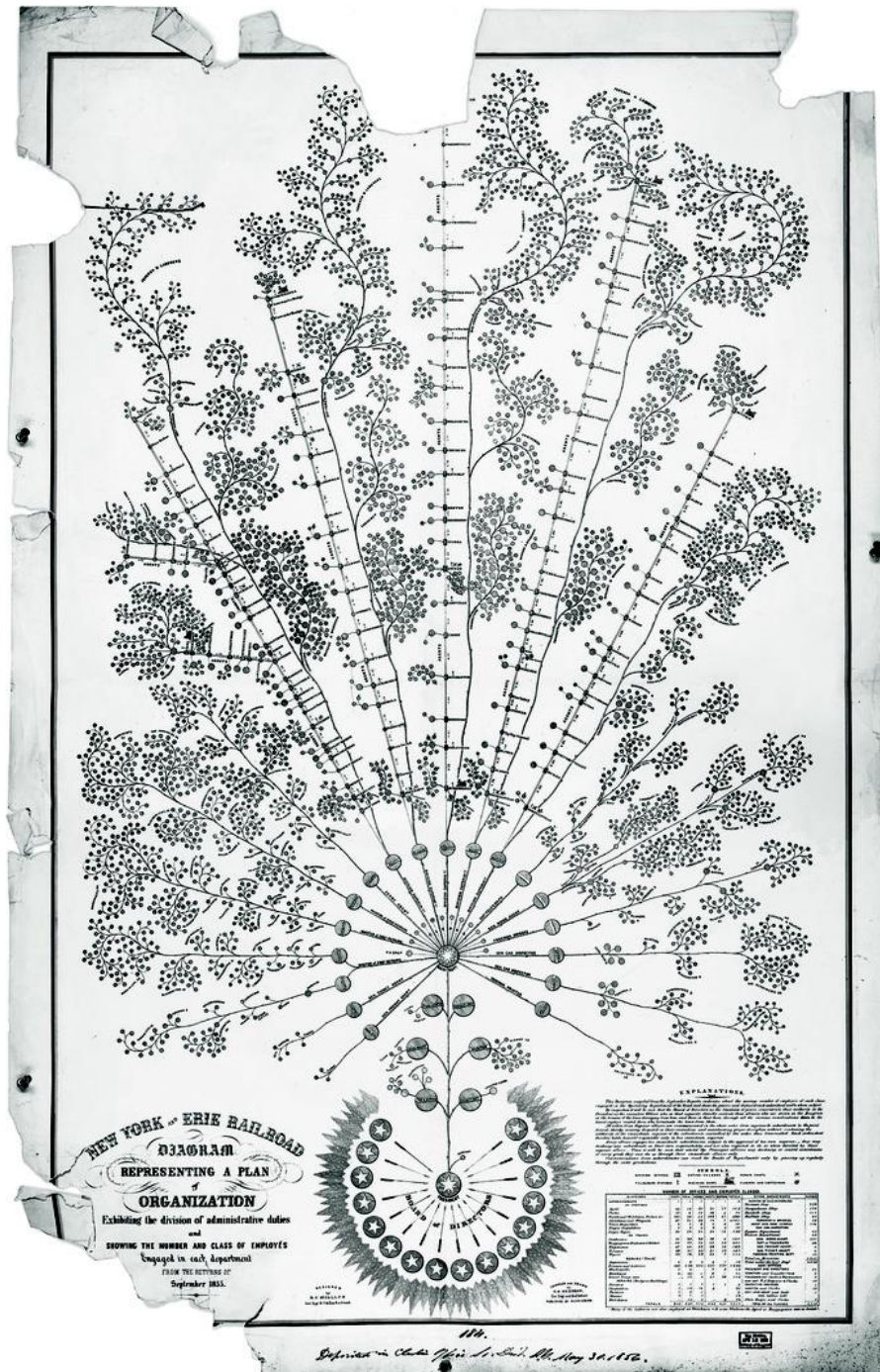
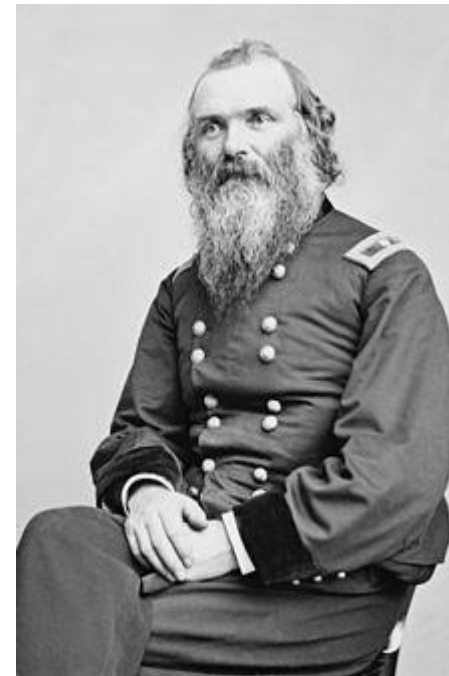
You never understand an organisation until you start to try to change it

**Kurt Lewin**

'a plan of organization'  
Daniel McCallum  
general superintendent  
New York and Erie Railroad ('the Erie')  
1855

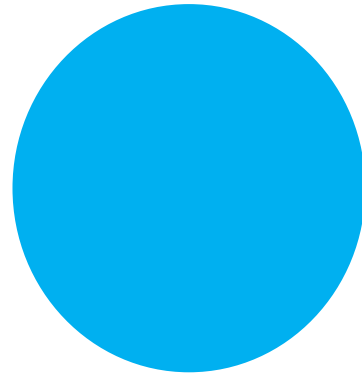
six principles:

1. A well-defined structure of responsibilities.
2. Strategic and sufficient assignment of power to managers so that they may dispose of their duties.
3. A method of tracking if duties are carried out on time or not.
4. An emphasis on reporting any breakdown of discipline or dereliction of duty so that it may be immediately corrected.
5. A method of obtaining reports that will neither diminish nor overpower managers down the value chain.
6. A method for helping managers identify both errors and delinquents.





# THE BLUE DOT







Why 'practices' are so important

The danger of double binds

# **FIVE CORE LEADERSHIP PRACTICES**

# Core management and leadership practices

'purposeful system'

Good and clear intent

measure and deliver 'what matters' to customers

productive system

Culture shaping

create conditions where people are productive – give discretionary effort

Triple loop learning

relationships

Constructive conversations

learning system

systems

meaning

Clarity

**Address danger / confusion / conflict / deficit / development as they arise**

# Foundations

The three basics (a requirement of management) create a *learning system*:

- 1. constructive conversations** (constructive challenge of reasoning, psychological safety, surfacing of emotions and ‘the undiscussable’) – nothing can develop unless there's a shared effort to get at the truth
- 2. clarity** – no learning is possible, and productivity and psychological safety are unlikely, without clarity of roles, tasks, and decision-making – and fit and stretch of roles and tasks to the level of thinking, adult development, skills, and capacity of individuals and teams
- 3. triple loop learning** – true learning isn't possible without planning, prediction, and learning and reflective practices

**Managers are responsible for generating clarity, honest, and learning**

# Productivity and purpose

4. **culture shaping** – understanding culture as a complex adaptive system how the interaction between leaders and teams/organisations determines psychological safety and productivity

Culture shaping develops a *productive system*

5. **good and clear intent** – align purpose and measures to real customer outcomes

Intent provides real orientation to customer / user / citizen / community outcomes – as measured by **them**

**Culture** and **intent** are **self-correcting measures** – if you measure the actual outcomes of your practices; the experience of employees and customers.

**Leaders take responsibility for building productive systems of purpose**

# The risks – and intervention priority sequencing

When you open up a system to learning and change, you are going to stir some things up. So you need to create the safe space to process these things as they arise:

- Danger (some threat in the system)
- Confusion (some loss of focus in the system)
- Conflict (some split, polarisation or conflict in the system)
- Deficit (some experience of need or deprivation or for reparation)
- Development (some requirement to increase depth, breadth or complexity)

Work needs to be done usually in this order of clearance if it is to be effective  
You don't have to resolve them – just hold enough space for processing, and make everyone feel safe that these things can arise, and it's not the end of the relationship.

Supervision – Psychoanalytic and Jungian perspectives. Edited by Petruska Clarkson, 1998 Whurr, London. Chapter 9.  
An intervention priority sequencing model for supervision. Petruska Clarkson pages 121-135



# SYMPTOMS, DIAGNOSIS AND PRESCRIPTION

# Symptoms

## **Lack of Honest, Productive Conversations**

Organisational silence, rumour mills, poor information flow, and high levels of distrust, not feeling valued. Oscillation from 'motherhood and apple pie' to outbreaks of aggression, and back again

## **Lack of Clarity Practices**

Role confusion, decision paralysis, ineffective meetings, stress, and territorial disputes.

Without clear roles and responsibilities, the system doesn't possess the variety required to handle its complexities, leading to inefficiency or failure.

## **Lack of Learning and Reflective Practices**

Repeated mistakes, low innovation, poor adaptability, and high employee turnover due to frustration, missing opportunities, poor development.

Learning and reflection are recursive systems that rely on observing one's own practices. A lack of this is a missed opportunity for self-reference and self-correction, which are critical for system survival.

## **Lack of Culture Shaping**

Low morale, high employee disengagement, high levels of stress, and unhealthy competition or toxic behaviour, unproductive work environment.

This creates a maladaptive complex system, pulled to undesirable states.

## **Lack of Practices for Good and Clear Intent**

Mission creep, strategic drift, resource misallocation, and poor stakeholder satisfaction.

Like a ship without a navigational system, the organization can't steer itself effectively. In cybernetic terms, the absence of a 'telos' or purpose can result in random or conflicting activities that don't lead to coherent performance.

# Diagnosis and prescription

## **Lack of Honest, Productive Conversations**

Diagnosis: anonymous surveys to assess levels of trust, openness, and efficacy of internal communication.

Prescription: structured dialogue sessions and train facilitators to lead open conversations that surface both reasoning and emotions.

## **Lack of Clarity Practices**

Diagnosis: map out decision-making and delegation processes and identify bottlenecks, ambiguities, and overlaps through interviews or observation.

Prescription: Redefine roles and responsibilities using tools like RAEW, and clarify decision-making authority, boundaries, and roles in the organisation.

## **Lack of Learning and Reflective Practices**

Diagnosis: analyse key performance indicators over time to identify recurring mistakes or missed opportunities.

**Prescription:** introduce after-action reviews and regular reflection periods, coupling them with a knowledge management system for organisational learning.

## **Lack of Culture Shaping**

Diagnosis: use listening sessions and sentiment analysis to gauge the current organisational culture.

Prescription: active culture shaping, and setting ‘the way we work around here’.

## **Lack of Practices for Good and Clear Intent**

Diagnosis: audit strategic plans versus execution to identify drift, and conduct stakeholder interviews to assess alignment with organizational goals.

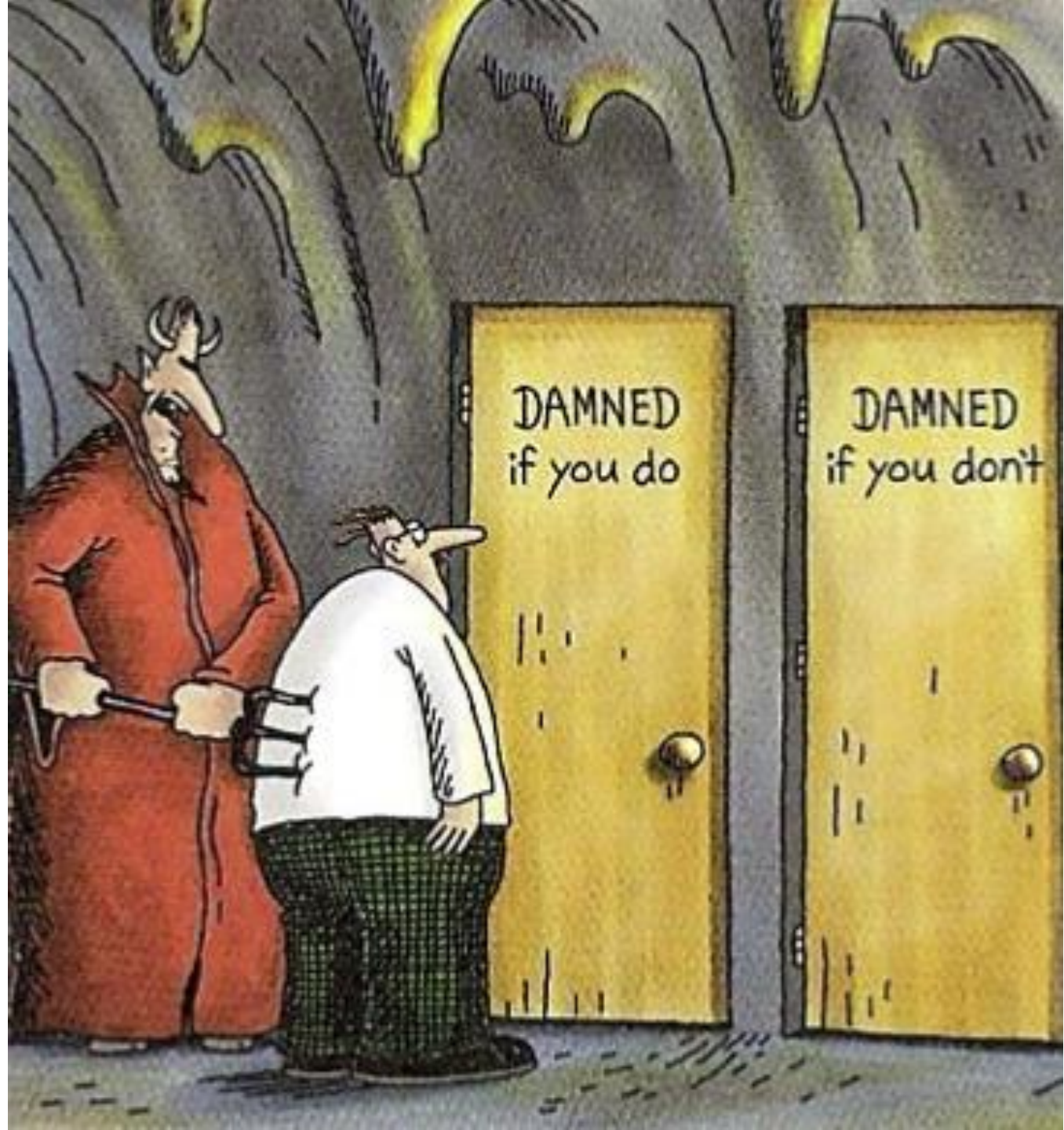
Prescription: establish a balanced scorecard or similar performance measurement system that aligns with organisational intent, working to outcome measures connected to value streams, and review it frequently.



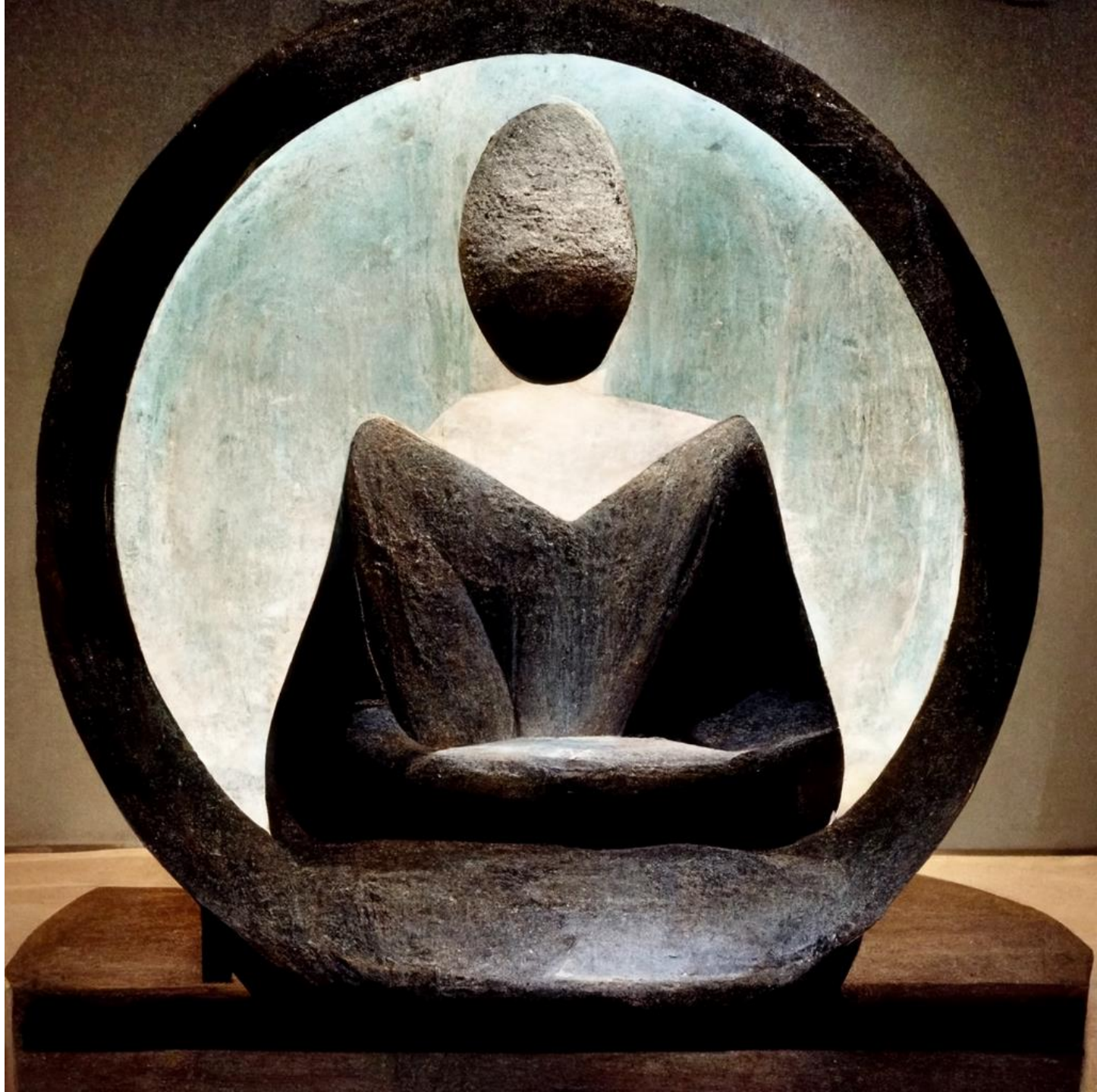


# **DANGERS AND *PRACTICE***

The  
danger  
of  
double  
binds



'Practice  
practice  
makes  
perfect,  
perfect is  
a fault; in  
fault lies  
change'



# Core management and leadership practices

'purposeful system'

Good and clear intent

measure and deliver 'what matters' to customers

productive system

Culture shaping

create conditions where people are productive – give discretionary effort

Triple loop learning

relationships

Constructive conversations

learning system

systems

meaning

Clarity

**Address danger / confusion / conflict / deficit / development as they arise**



# **THE THREE CORE MANAGEMENT PRACTICES**

# Tools, techniques, and practices include...

## Conversations

- Ground rules (Schwarz)
- The ladder of inference
- Traditional vs learning virtues
- The left hand column
- Drama triangle
- BRAVING inventory

## Clarity

- CPORT task clarity
- Role clarity process
- Team decision-making process
- The three box model
- Strategic clarity

## Learning

- Journaling
- Action inquiry
- Debrief
- Check-in and check-out
- Action learning sets
- Triple loop learning

## Creating the learning system



Schwarz's Ground rules

Brené Brown's BRAVING

Four ways in, shadow and payoff

Noticing and making known

Action inquiry

Retrospective

Chris Argyris

- Traditional and learning virtues
- Ladder of inference
- Advocacy and enquiry
- The left hand column

# DEVELOPING CONSTRUCTIVE CONVERSATIONS

# Authenticity and honesty are scary – but generate safety

A ‘devil’s bargain’ of unaccountability

- I’ll never completely communicate what you need to do
- So we can both hide from responsibility
- I will never be satisfied by you
- But I can never fully hold you to account
- So we’ll both be dissatisfied
- But we will be in a stable situation where nothing will ever change!
- We won’t have to face the stress of accountability and change...

Authenticity and honest communication

- We’ll have many more productive conversations where we can move forward together...
- But we might find out ways we don’t fundamentally agree...
- Even ways we don’t fundamentally respect each other...
- Do we want to know?

The initial effort can be scary – but the end result is greater security

**Constructive conversations have all kinds of implications!**





# GROUND RULES FOR EFFECTIVE TEAMS – SCHWARZ

# Ground rules for effective groups – Schwarz

- Test assumptions and inferences
- Share all relevant information
- Use specific examples and agree on what important words mean
- Explain your reasoning and intent
- Focus on interests, not positions
- Combine advocacy and inquiry
- Jointly design next steps and ways to test disagreement
- Discuss undiscussable issues
- Use a decision-making rule that generates the level of commitment needed



# CHECK IN

# Check-in

## Purpose

To allow each group member to share how they are entering a space, to fully arrive in the session.

## Practice

Checking in starts with each person providing space and permission to ask ourselves and share with others:

- How am I doing?
- How's my body feeling?
- Where is my mind?
- What has my attention?
- What would add value?

**A way of being really present and acknowledging who we are**



# **BRAVING (BRENE BROWN)**

# Brene Brown

## BRAVING

---

**BOUNDARIES:** You respect my boundaries, and when you're not clear about what's okay and not okay, you ask. You're willing to say no.

**RELIABILITY:** You do what you say you'll do. At work, this means staying aware of your competencies and limitations so you don't overpromise and are able to deliver on commitments and balance competing priorities.

**ACCOUNTABILITY:** You own your mistakes, apologize, and make amends.

**VAULT:** You don't share information or experiences that are not yours to share. I need to know that my confidences are kept, and that you're not sharing with me any information about other people that should be confidential.

**INTEGRITY:** You choose courage over comfort. You choose what is right over what is fun, fast, or easy. And you choose to practice your values rather than simply professing them.

**NONJUDGMENT:** I can ask for what I need, and you can ask for what you need. We can talk about how we feel without judgment.

**GENEROSITY:** You extend the most generous interpretation possible to the intentions, words, and actions of others.



# **‘TRADITIONAL’ VERSUS ‘LEARNING’ VIRTUES**

## Traditional virtues

- Support: give your approval and praise; say what you think others want to hear; minimise expression of disapproval and blame
- Respect: do not challenge others' reasoning processes  
(because you believe they have made them un-discussable, or because you believe that to do so would lead to embarrassment and loss of face for them )
- Team play: maintain the appearance of alignment; do not question the work of others.

## Learning virtues?

**What are the benefits of the traditional virtues? What are the costs?**



## Traditional virtues

- Support: give your approval and praise; say what you think others want to hear; minimise expression of disapproval and blame
- Respect: do not challenge others' reasoning processes (because you believe they have made them un-discussable, or because you believe that to do so would lead to embarrassment and loss of face for them )
- Team play: maintain the appearance of alignment; do not question the work of others.

## Learning virtues

- Support: help others see gaps in their logic or limits to their views. Alert others to the unintended consequences of their actions
- Respect: assume others are well motivated and competent, even if motives and logic are unclear. Assume they are interested in and capable of learning.
- Team play: express your concerns and inquire into others' logic in ways that encourages them to do the same. You may be part of the problem you are seeing.

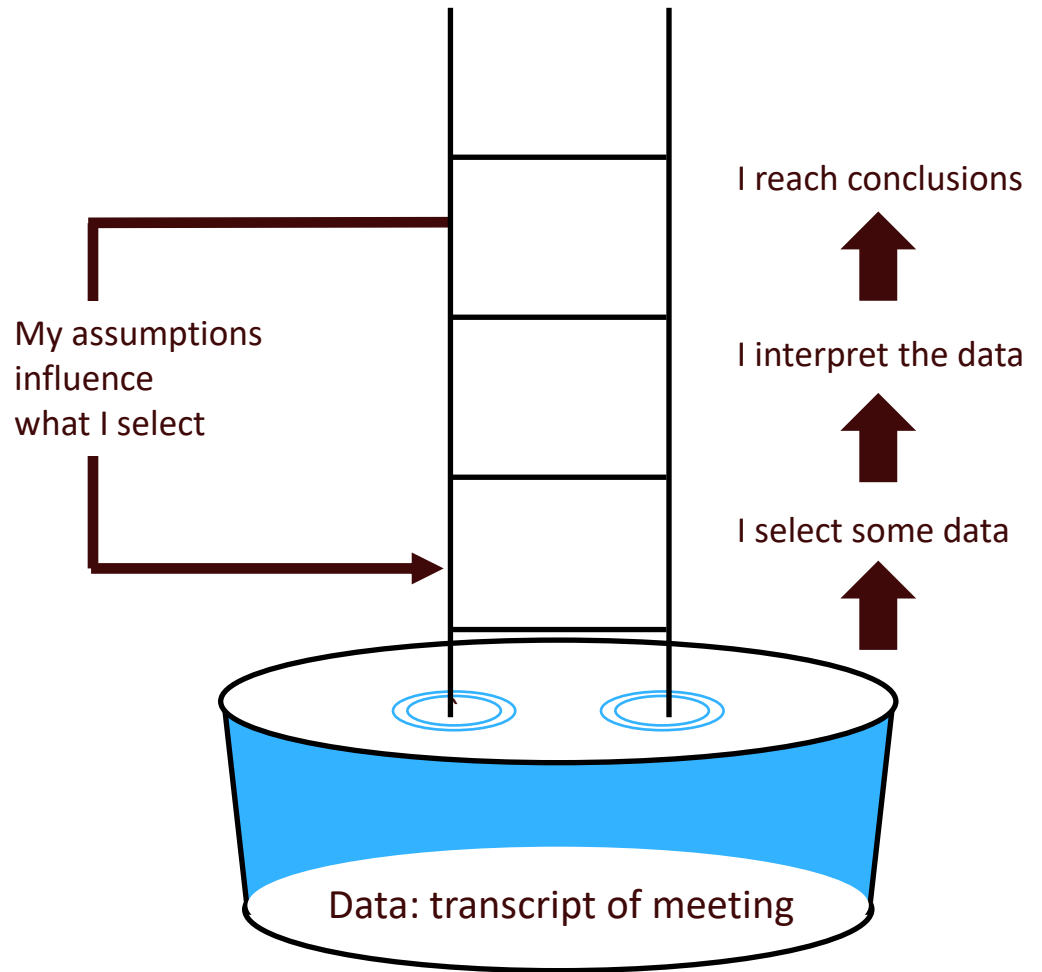
**What are the benefits of the learning virtues? What are the risks?**



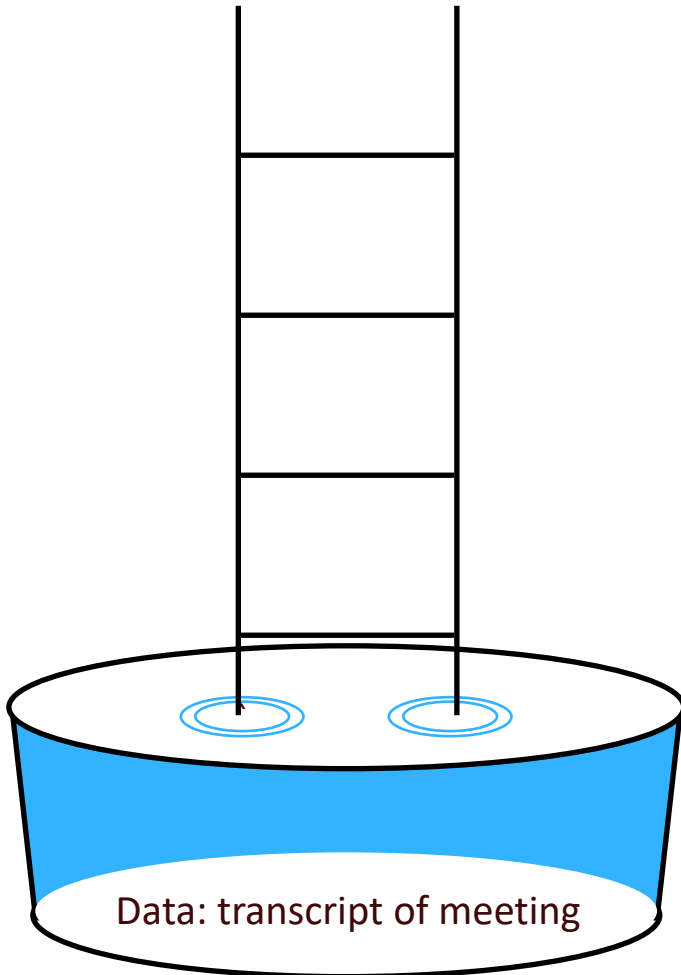
# THE LADDER OF INFERENCE

# The ladder of inference

- Our minds are designed to make rapid and continuous inferences about other people. Understanding the data and logic that support
- our inferences helps us to test their validity



# Illustrated ladder: version A



Conclusion:

Leader is control freak, and un-influenceable

Interpretation:

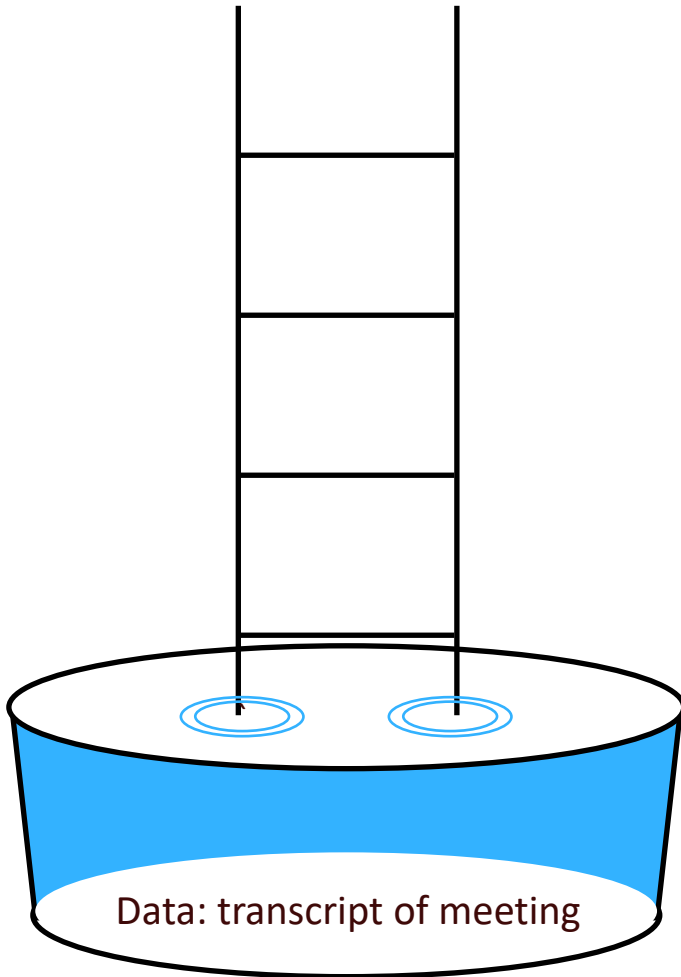
Leader is unilaterally changing direction

Data selected:

'I'm thinking of making a change'

- Leader says, 'I'm thinking of making a change, but before I make a decision, I'd like to get your thoughts'

# Illustrated ladder: version B



Conclusion:

Leader wants participation, believes in shared decision-making

Interpretation:

Leader will consider input prior to making a decision

Data selected:

'I'd like to get your thoughts'

Leader says: 'I'm thinking of making a change, but before I make a decision, I'd like to get your thoughts'



# **ADVOCACY AND INQUIRY – ‘STATE’ AND ‘ASK’**

# Balance – state and ask

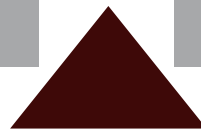
- Balancing your advocacy with inquiry will foster mutual learning
- Ask for alternative views
- Look for examples that illustrate your views
- Ask for others' reasoning and data
- Not all advocacy and inquiry are equal. High quality advocacy and inquiry bring others' reasoning and data to the surface
- Challenge your own view with enquiry: 'Do you see it the same or differently?'
- Explain the steps of the reasoning by using the Ladder of Inference

## Advocacy

Share your data  
Tell others about reasoning  
Acknowledge your assumptions  
Test your conclusion, rather than stating them as facts  
Explore alternative interpretations of the data

## Inquiry

Ask questions that surface reasoning and data  
Search for alternative views  
Keep your curiosity going

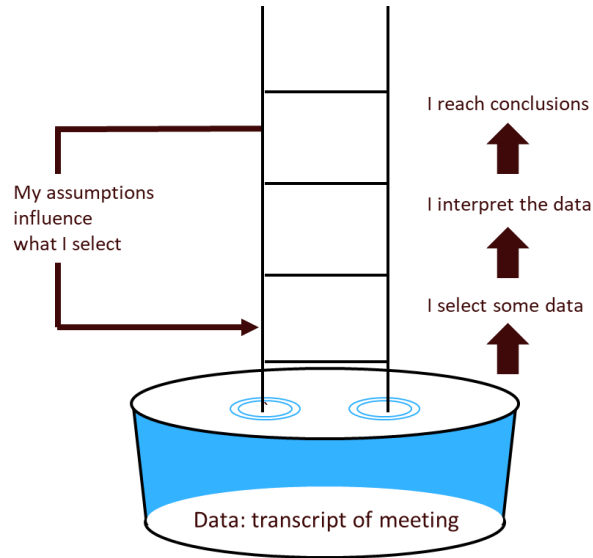


## Advocacy

- State your ideas, opinions, desires
- Make your assumptions known
- Reveal the steps in your thinking
- Give specific examples and illustrations
- Engage : Go to Inquiry

Advocacy provides a set of skills for slowing down the process and revealing to others how we draw our conclusions.

## The ladder of inference



- To use the ladder
  - Listen for conclusions or opinions
  - Ask for the 'data'
    - (e.g., 'What is it that leads you to say that?')
  - Make the steps in your reasoning visible
  - Gently demand that others do the same
  - Before you agree or disagree, check out the meanings of words (e.g. leadership, power, 'isn't working', be successful, etc.)

## Inquiry

- Inquire into other people's views
- Ask others to reveal the steps in their thinking
- Check out your 'interpretations'
- Encourage people to challenge your conclusions
- Genuinely listen and be willing to be influenced

Inquiry provides a set of skills for discovering how others reached their conclusions, and for understanding the impact of our actions on others.





# THE LEFT HAND COLUMN

# The right hand column: what was said

	What we actually said and did
	<p>Me: Adam, that was an interesting presentation. Do you have a minute or two before you take off for the train station?</p> <p>Adam: Sure, why not? I'd like to get your thoughts on the presentation anyway.</p> <p>Me: I thought a lot of your presentation was great. But, you know, I'm still a little bit worried that the justification for buying the new sites didn't come across very well.</p> <p>Adam: Well, I was pretty happy with the presentation. I think others were too. We have to believe in our work, right?</p> <p>Me: Yeah, I think it's important to stand by your work, but we could probably tighten up the argument just a bit more.</p> <p>Adam: Ok, thanks.</p> <p>...(continue until you have included the key exchanges that took place)</p>

**The left hand column: what I thought and felt, but didn't say...**

# Left hand column: what was thought and felt, not said

My unspoken thoughts and feelings	What we actually said and did
<p>Here we go again. This version of the presentation was the same as the last three he's done. He doesn't get it. He just talks about how he's going to manage the sites, but he doesn't build up the argument for why we should buy the sites in the first place.</p> <p>He couldn't put together a budget proposal if his life depended on it. Doesn't he understand these are major investments?</p> <p>He is so stubborn. Why won't he accept that I've been around here longer and I know what I'm talking about? He just doesn't listen.</p> <p>He says ok, but I'm sure the next version won't be any different.</p>	<p>Me: Adam, that was an interesting presentation. Do you have a minute or two before you take off for the train station?</p> <p>Adam: Sure, why not? I'd like to get your thoughts on the presentation anyway.</p> <p>Me: I thought a lot of your presentation was great. But, you know, I'm still a little bit worried that the justification for buying the new sites didn't come across very well.</p> <p>Adam: Well, I was pretty happy with the presentation. I think others were too. We have to believe in our work, right?</p> <p>Me: Yeah, I think it's important to stand by your work, but we could probably tighten up the argument just a bit more.</p> <p>Adam: Ok, thanks.</p> <p>...(continue until you have included the key exchanges that took place)</p>

**The left hand column: what I thought and felt, but didn't say...**

# Left hand column exercise

What I thought and felt, but didn't say...	What was said
	Three or four lines in a critical conversation...

**Find an example conversation and think it through...**

# Being authentic

Authentic behaviour around a task means you put into words what you are experiencing with the owner as you work. This is the most powerful thing you can do to have the leverage you are looking for and to build commitment.

**Project owner:** 'Well, this project shouldn't take you too long. Couple of days, and you will be done. I wish I had some time to spend with you, but there are some really important things I must attend to. My secretary can give you some assistance. Also, don't take too much time from any of my people. They are under a lot of pressure.'

**Deliverer's experiences:** Feeling unimportant, small. My work is being treated as a trivial matter. This is how I make my living, but to this character, I am an interruption.

**Non-authentic response:** 'This project could have far-reaching implications. Finance is looking closely at these projects to assess our capability. They are also a requirement.'

**Authentic response:** 'You are treating this project as though it is unimportant and small—a trivial matter. If it is an interruption, maybe we should reassess the timing. I would like you to treat it with more importance.'

**Being authentic is a genuine challenge – but genuinely simple**



# WAYS IN TO PARTNERSHIP

# Ways in to partnership

	Avoidance (‘there’s no conflict’)	Productive (creative surfacing of conflict)	Explosion (unproductive conflict)
Vision	Motherhood and apple pie with no real world reference	<b>Shared views, differences, achievable ambition</b>	Unproductive conflict over form rather than function
Opportunities	Individual opportunities and ‘low hanging fruit’	<b>Valuable opportunities that require collaboration and generating real learning about working together effectively</b>	Identify where others have to change
Problems	‘There are no problems’ (or problems are located outside the partnership)	<b>Real problems that require collective action and generate learning</b>	Blame and focus on the problems of the other
Relationships	‘There are no problems’ or ‘general unobjectionable principles’	<b>Current strengths and weaknesses, productive learning, sharing of perspectives</b>	Unproductive conversations, rehashing past conflict



# THE DRAMA TRIANGLE



# Drama triangle



- The roles switch from one to another
- We often have one role that we easily jump into in, we see that as our own identity

Karpman (1968)

# The prosecutor

- Usually have an underlying fear of their own victimisation and, therefore, adopt various methods to control, protect and defend themselves
- Frustrated, a bit of a bully



# The rescuer



- Takes responsibility for other people problems and will make it their own problem
  - They don't look at their own problems
  - They will help everybody else
  - They focus on what isn't working so they always have a job to do or something to fix

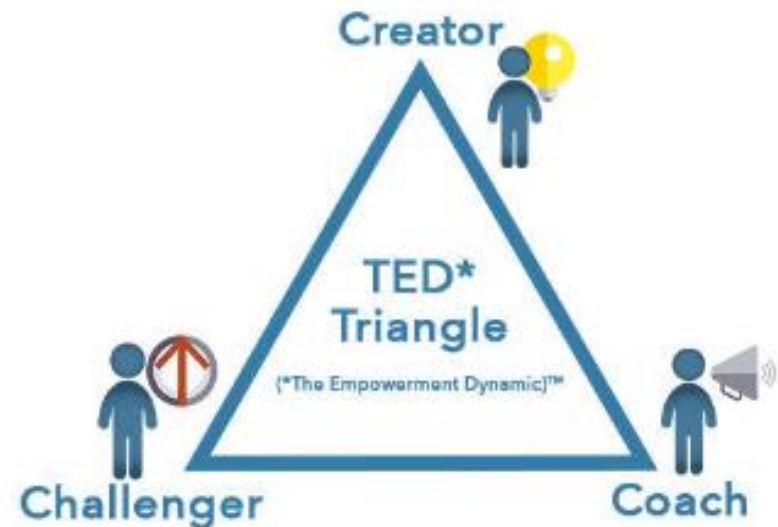
# Victim

- The person who feels helpless and powerless
- They often think things: 'this always happens to me'
- Because of the sense of powerless, they can be full of self pity



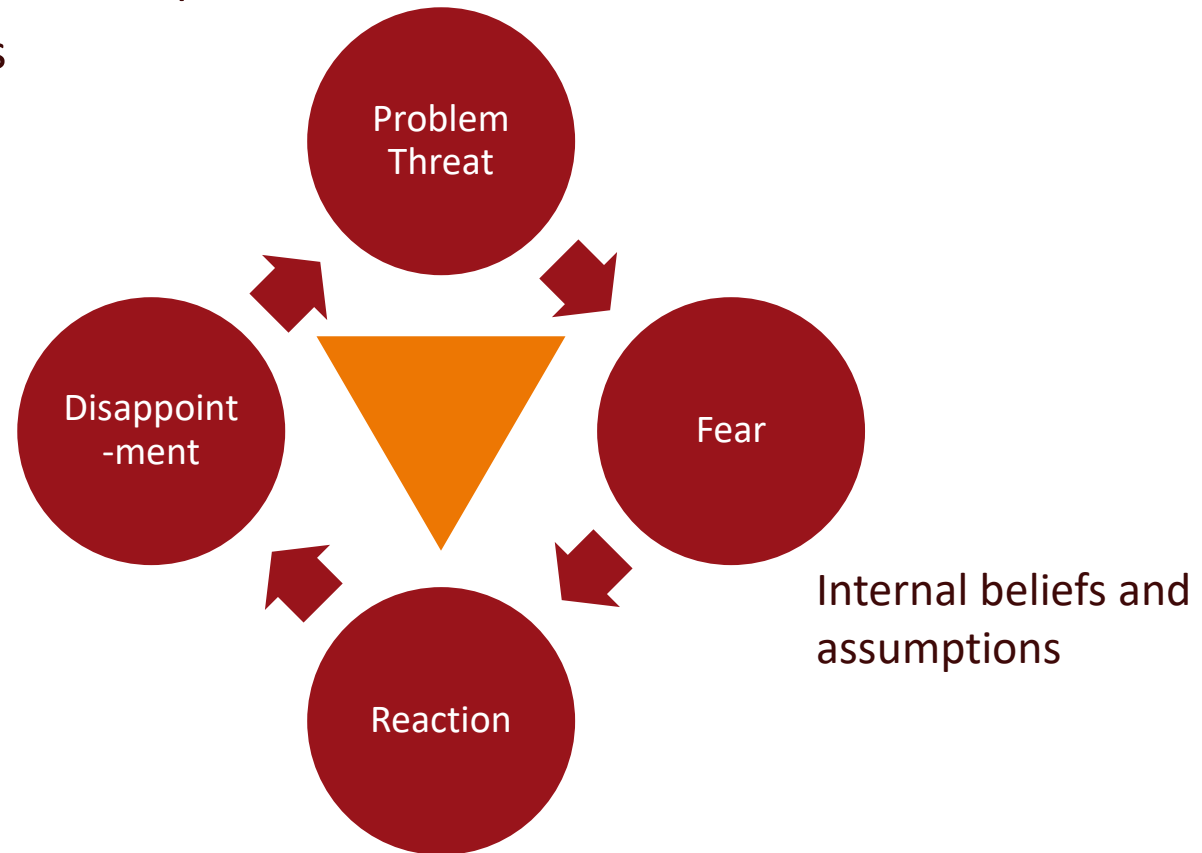
# How do we get out of the drama triangle?

- If you are a persecutor, become a challenger
  - Be firm but fair
  - Support and encourage the other person but set boundaries
- If you are a rescuer, become a teacher / coach
  - Think of ways how you can help people solve their problems
  - Set boundaries on how much time you spend on helping people
- If you are a victim, become a creator:
  - Think like a problem solver
  - Reflect on the good things



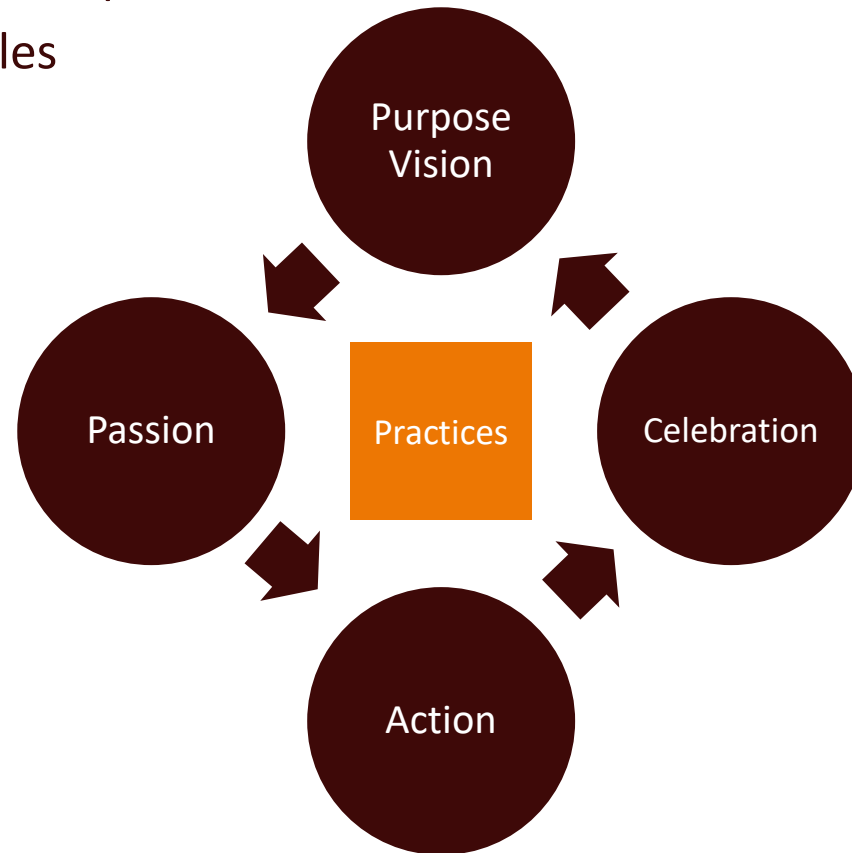
# The drama triangle leads to a reactive cycle

- Protect, assimilate, adapt, survive
- Avoid obstacles

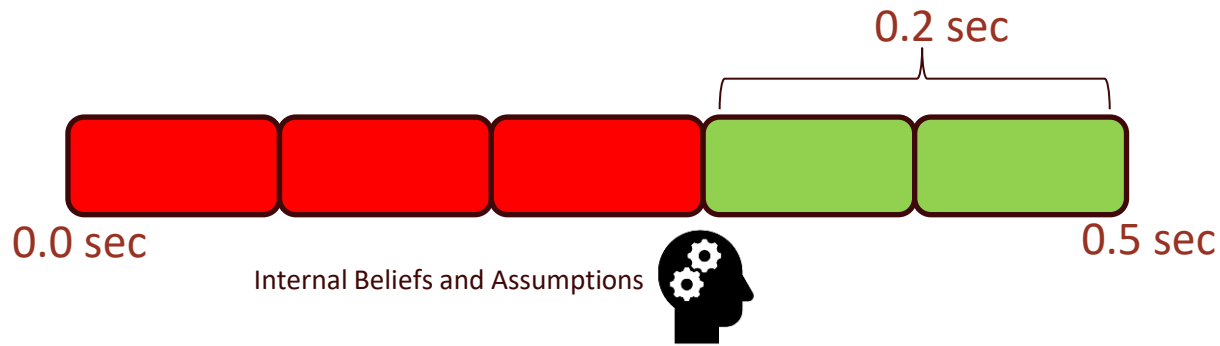


# The creative cycle alternative

- Discover, potential, possibilities
- Address obstacles

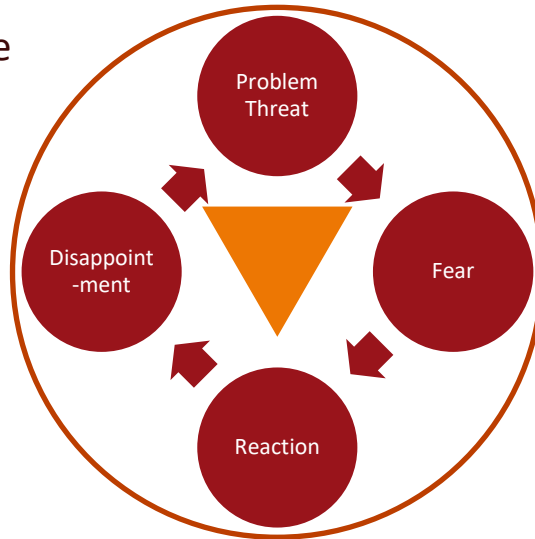


# The window of choice



Reactive cycle

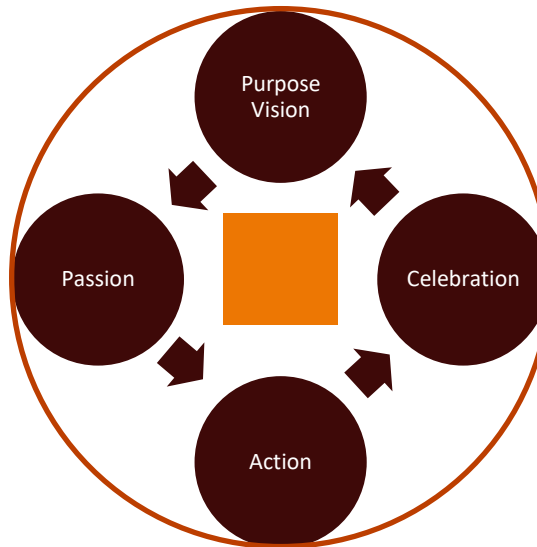
Threat



?

Creative cycle

Reward





# Being helpful and avoiding the drama triangle

- Be confident in your abilities and motivated to foster competence in others
- Approach others with positive expectations
- Understand that enhancing a person's sense of confidence or self-worth is most likely to occur when the person is successful in meeting new challenges
- Support any effort on an individual's part to be more responsible and effective
- Be congruent
- Clarify the consequences, and impose them when the individual's behaviour warrants it
- Accept no excuses for failure
- Do not do things you feel pressured to do for employees
- When someone fails to carry out their responsibilities, confront the failure without conveying the feeling they have let you down
- Verbally and emotionally support any effort on an individual's part to take responsible action

Dick McMahon - Schwarz 2005



Journaling

Action inquiry

Debriefing

Check-in and check-out

Action learning sets

Triple loop learning

# LEARNING PRACTICES



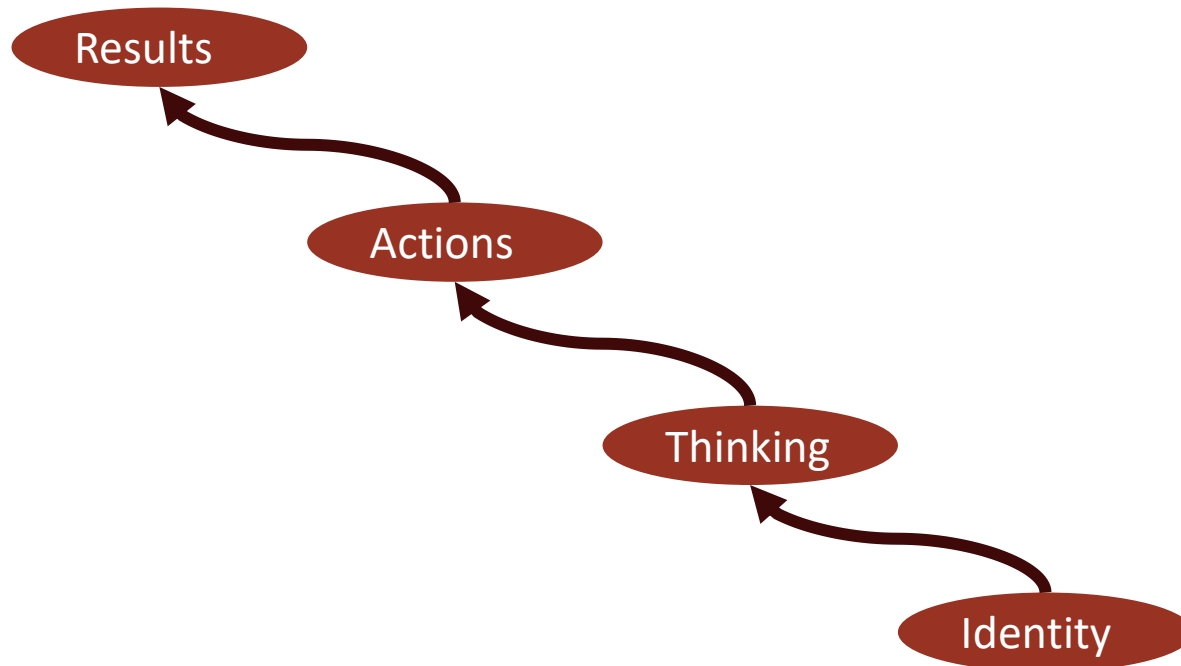
# **DOUBLE AND TRIPLE LOOP LEARNING**

You never understand  
an organisation until  
you start to try to  
change it

Kurt Lewin

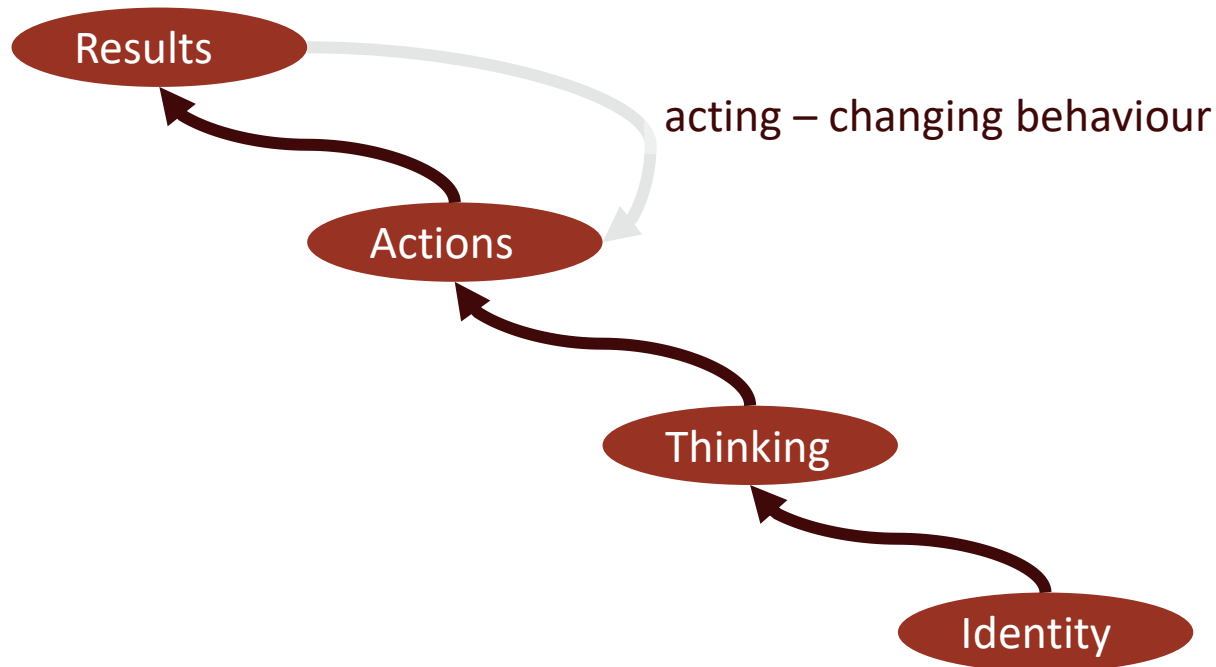
# Transformational learning – Argyris, Bateson

Our results are shaped by our actions, shaped by our thinking, our identity



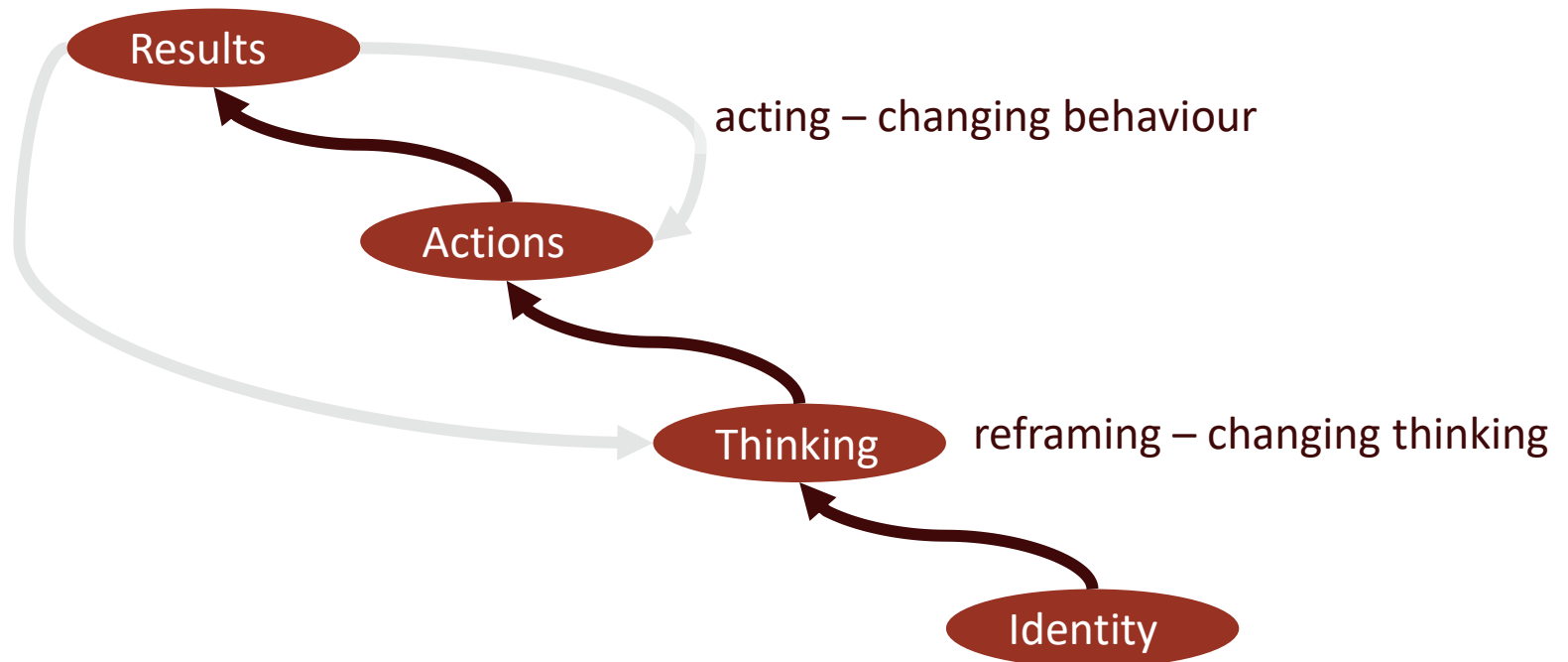
# Single loop learning

Changing our actions for better results



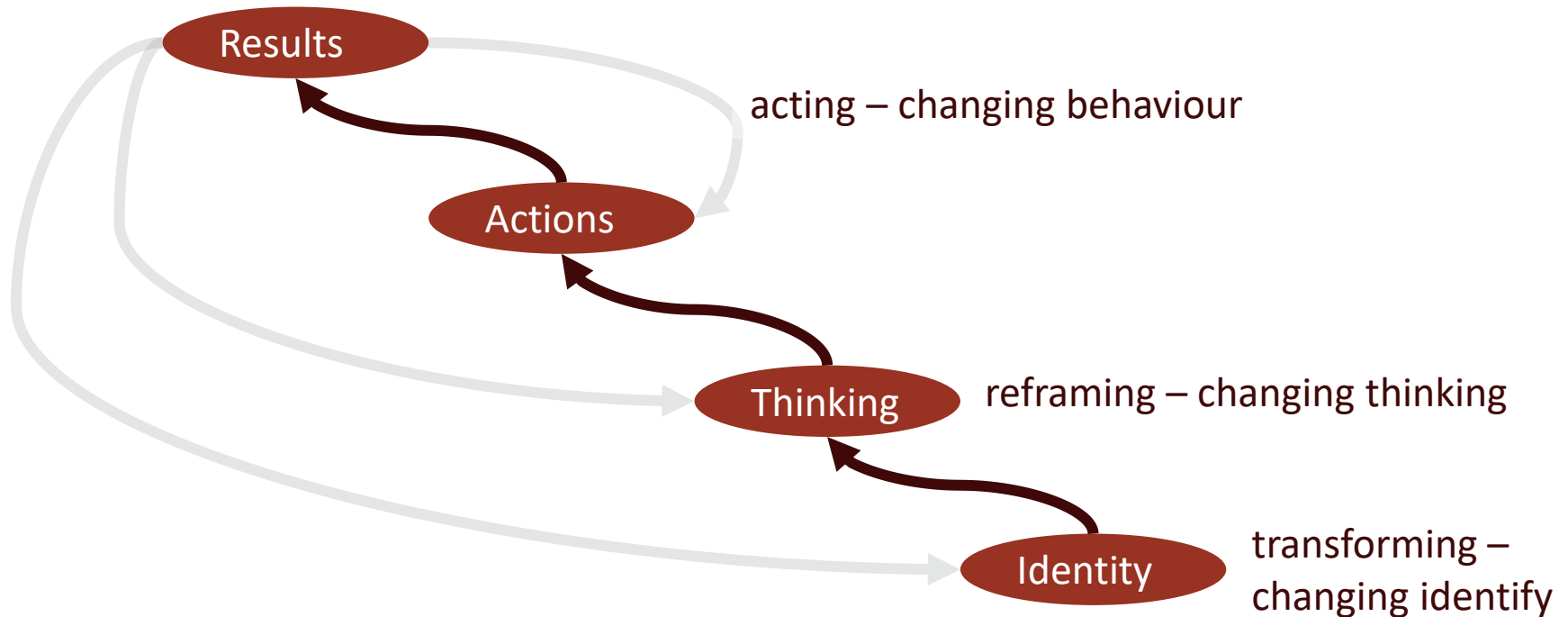
# Double loop learning

Changing our thinking



# Triple loop learning

Changing our identity



**No learning without planning. Innovation requires changing the rules.**





# SYSTEMS CHANGE

# A systems change map

The big picture: outcomes arise from complex, adaptive systems

What are we here for? Principles and actions

Seeing the system – what works, what are the opportunities?

Intervening in the system – build on strengths, shape positively

Learning

Is the system learning?

Are we learning?

**These are logical levels, not linear steps – all working simultaneously**



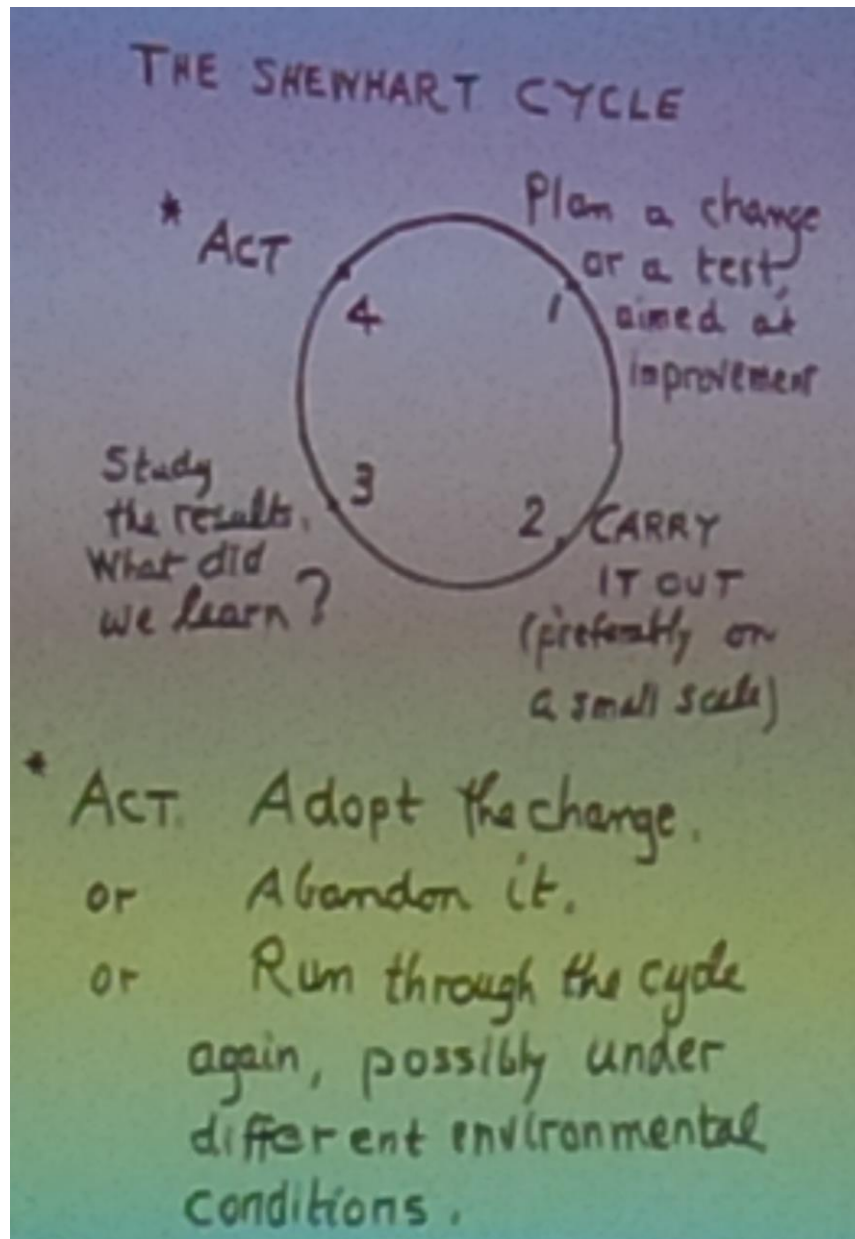
# **ACTION INQUIRY**

# A simple 'action inquiry' process

- Inquiry theme
- Plan to get knowledge
- Findings – how well is this theme supporting us to do what matters at the moment?
- A theory: an idea about how to make things better idea
- A test: the thing I can do to see if the theory is correct
- My prediction: what I think will happen when I try the test (including the likely stress and resistance)
- Likely response: how I can respond constructively to the tension
- What did we learn?
- What else? About our process? Relationships? Who we are and who we need to be?
- Next action

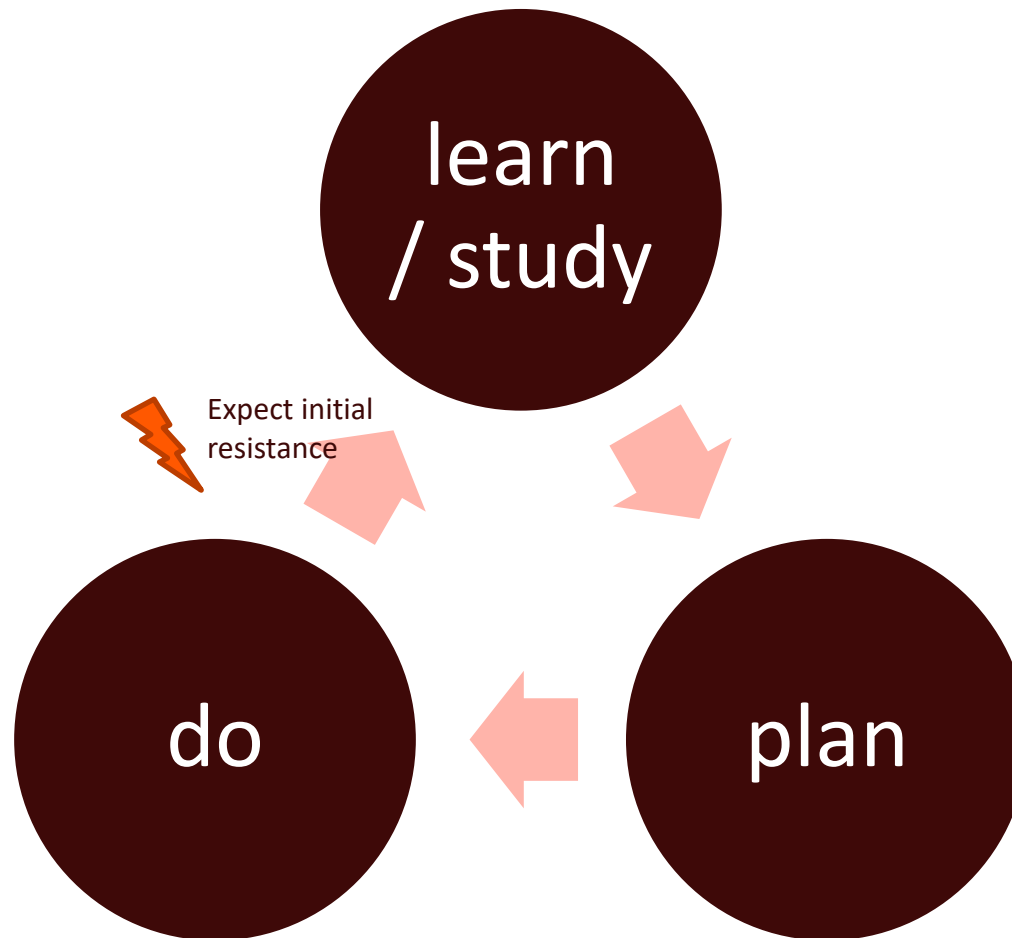
**Partner comments (check/validation) throughout**

# This is a version of the 'Shewhart Cycle' from Deming



- Plan
- Do
- Study
- Act

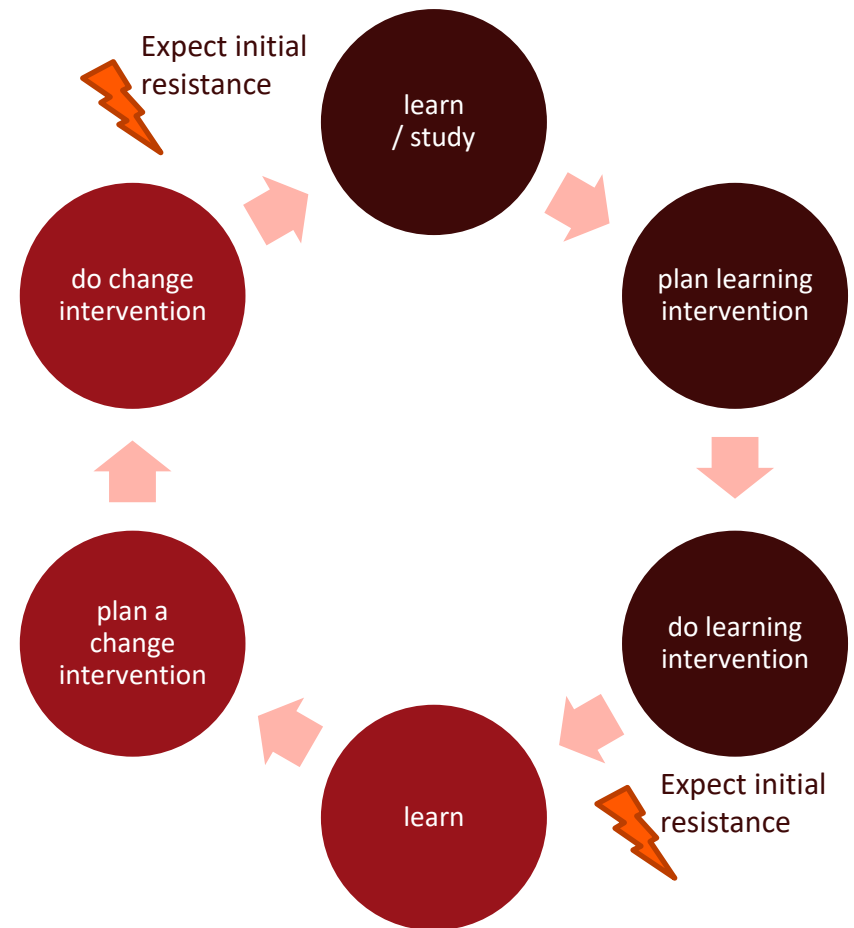
# Basic cycle



**Your action inquiry is just two loops around the learning cycle**

# Basic cycle

# Action Inquiry



**Your action inquiry is just two loops around the learning cycle**



CPORT task clarity

Role clarity process

Team decision-making process

The three box model

## **CLARITY PRACTICES**





# CREATING CLARITY

# A definition of 'work'

'effort, to a purpose, using judgement and discretion, within boundaries, over time'

## Purpose

- A fundamental and powerful idea: the intent to achieve something.
- Purpose depends on context, framing, understanding, level of thinking and much more.
- The purpose and the context must be communicated and understood for work to be done.

## Judgement and discretion

- There's no 'work', no value of a human over a machine unless these are brought into play.
- And that means freedom to act.

Freedom to act, if unboundaried, is stifling and confusing and would create chaos.

## Boundaries

- Without boundaries, we have creativity, or expression – not work.
- Judgement and purpose provide some inherent boundaries, but we too often fail to clarify the boundaries of the work we want to do.
- Boundaries protect the space for discretion and enhance effectiveness – they stop overreach and confusion and allow confidence in freedom to act.

**The boundaries make the work make sense (after Elliot Jacques)**

# To engage discretion (freedom) – set constraints

## 'Soft' principles – freedom/discretion

**Underlying organisational purpose** – the implicit raison d'être, which gets people motivated and unites them

**People's skill and will** – people have both the skill to do their job and they are motivated, which allows devolvement

**Tolerance to ambiguity** – things look a bit chaotic and there is a degree of tolerance to such ambiguity

**Freedom to act** – individuals have full discretion how they go about doing jobs/achieving objectives

## 'Hard' principles – constraints

*and* **Clear individual objectives** – each person knows what he / she is trying to achieve and why, and there is an element of self-setting

*and* **Few simple rules** – there are a few clear rules which lay down how people operate and the key principles they must follow

*and* **Unambiguous feedback** – there are clear measures which enable people to see how they are doing at any point in time

*and* **Clear boundaries** – these lay down what people are enabled to do or not, and where they should operate

## Complex Adaptive Leadership – Professor Nick Obolensky



# FOUR CORE QUESTIONS AT WORK

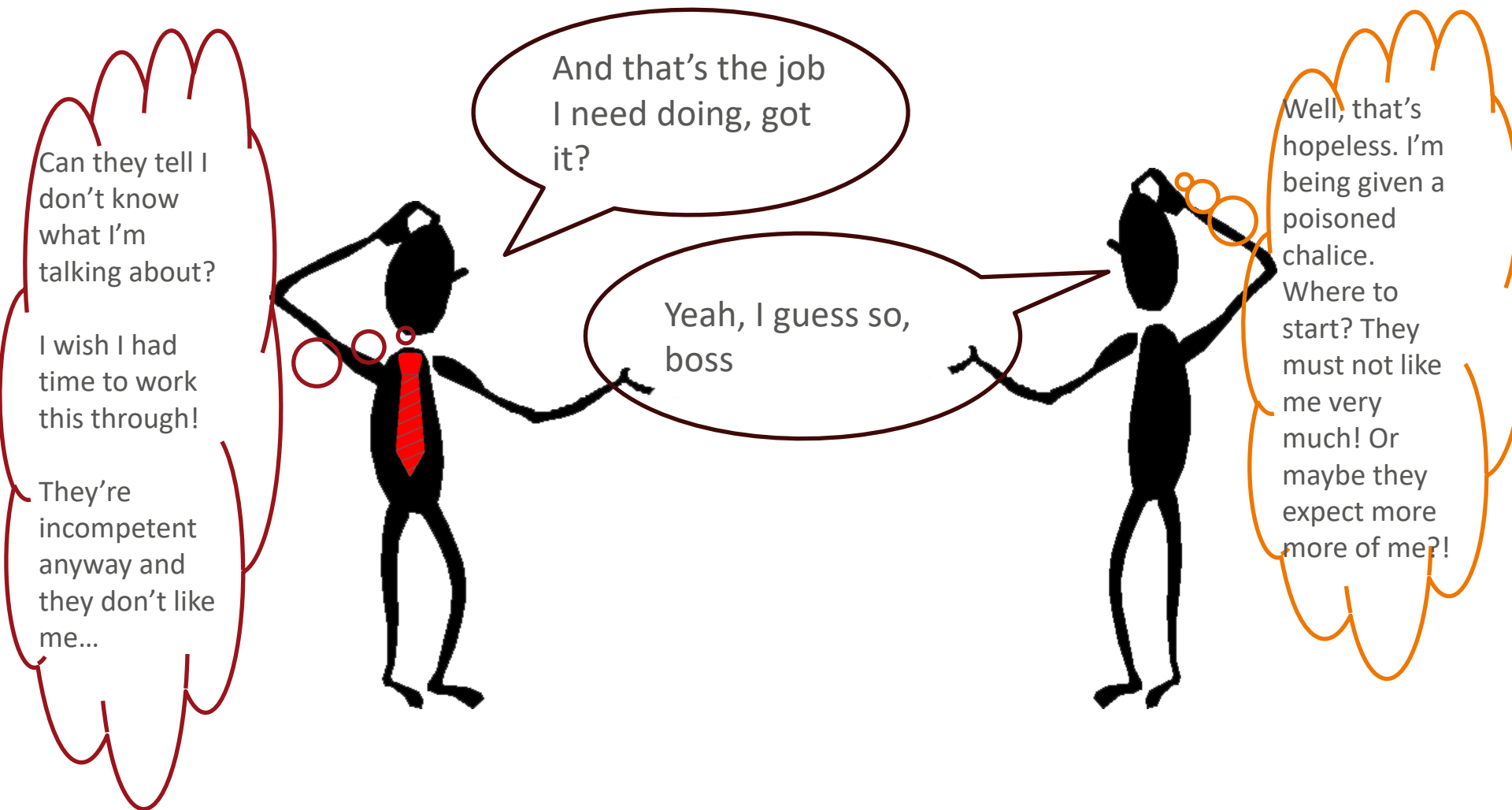
# Four core questions at work

- What's my job?
- How should I work with others?
- How am I doing?
- What's next?

(Compare 'the devil's bargain')

**If you don't have clarity, you are in murky territory**

# Getting things done in organisations – three conversations



# Three conversations in organisations – the results

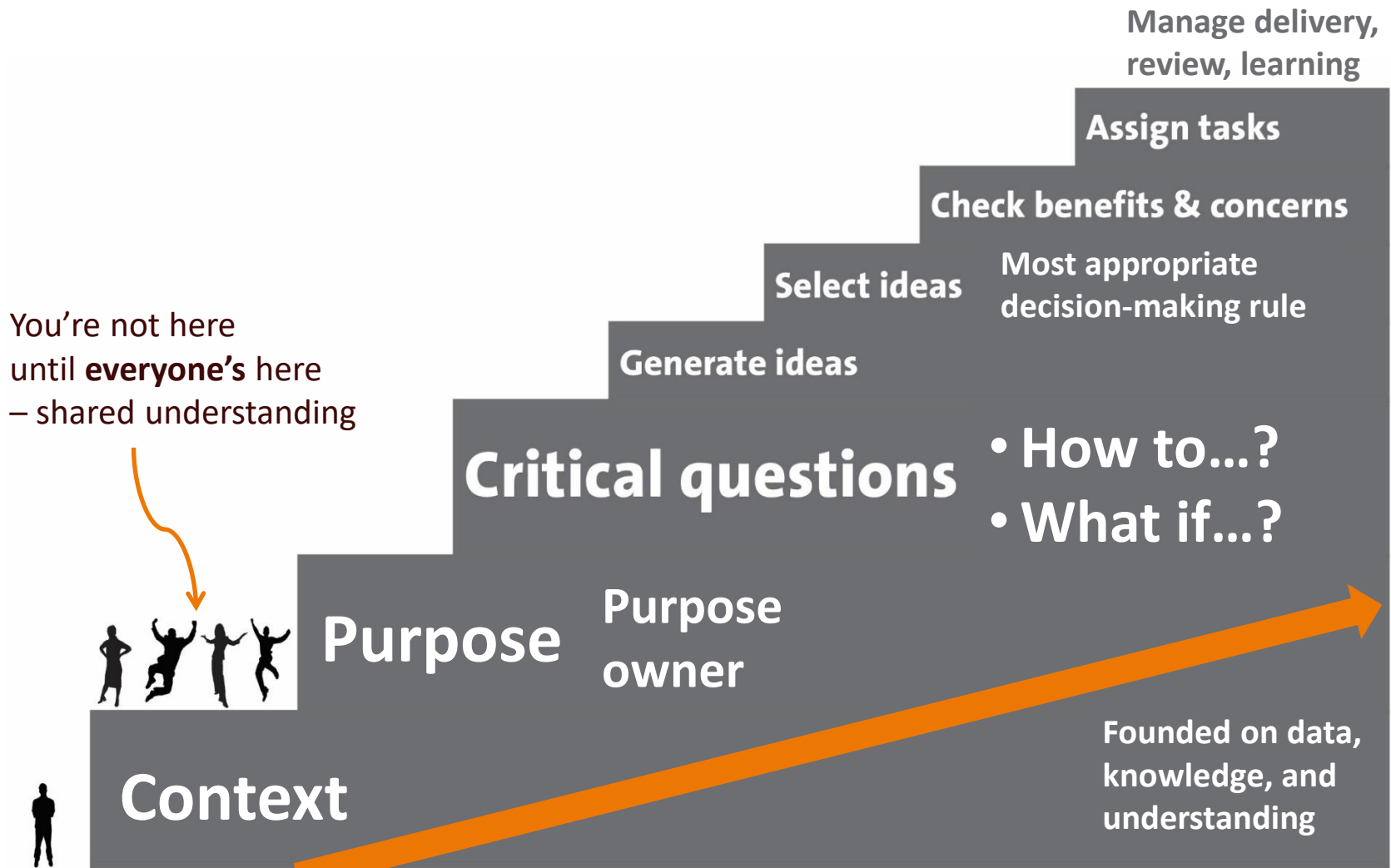




# TEAM DECISION-MAKING DISCIPLINE



# Team problem-solving





# **SHISA KANKO**

# **POINTING AND CALLING**

# Pointing and calling



(1) **Look at an object.** (2) **Point at it.** (3) **Raise your right hand to your right ear.** (4) **Bring your hand down.**

- State the item to be confirmed.
- Extend your right arm straight.
- Point at the object with your index finger.
- Look at the object.
- Raise your right arm to your ear.
- Make sure it is OK.
- Confirm the appropriateness of the object.
- Say "OK".
- Bring your arm down, pointing the object.

(3) You must make sure it is really OK while you raise your right arm to your ear.

## Shisa Kanko



**Ownership** without **blame** and without being **disabled** by overwhelm

## **ROLE PROCESS AND CLARITY**

# Role process exercise

Covers:

- **Place** of the role in the **structure**
- **Purpose** (the unique reason for this role to exist) *single sentence, no 'and'*
- Expected **results** to be delivered by the role, and how they'll be measured
- **Responsibility** for culture, safety, development, citizen experience
- **Business** – what is the **work** of the role, how will the work be measured
- **Authorities** – financial, leadership, team
- **Peer relationships**, authority and responsibility both ways
- **Authorisation** – manager, manager's manager,
- **Understanding** – of direct reports, direct reports of the direct reports
- Relationships with **peers**
- Planned role **review**

# Role clarity worksheet

Title:

Name:

Reports to (role not name):

Direct reports (role not name):

Purpose (the unique reason for this role to exist):

*Single sentence, no 'and'*

Expected results to be delivered by the role:

## **Responsibility**

Culture, safety, development:

Citizen experience:

## **Business**

The work – what you need to do to make this contribution:

Measures – what will demonstrate that your work is being delivered:

## **Authorities**

Financial:

Leadership:

Team:

Peer relationships – who you must collaborate with:

Authority role must give to peers:

Responsibility to peers:

Authority peers must give to role:

Responsibility of peers to role:

## **Authorisation and understanding**

This role authorised by manager's manager

Role agreed with manager

Discussion for understanding the work of direct reports

Discussion for understanding the work of the direct reports of direct reports

Authorities agreed with relevant peers

Role review due



# CPORT TASK DEFINITION

# A clearly defined task – CPORT

- Context – why / where it fits in / limits
- Purpose – what it is to do
- Outcome – what standard, what specifications, how many etc
- Resources – with what, with whom
- Time – by when

**Discipline creates positive dynamics**





# THE THREE BOX MODEL

# Three-box model

<b>Non-negotiable (information)</b>	<b>'Check with me' (consultation)</b>	<b>The work to be done (delegation)</b>

# Three-box model

<b>Non-negotiable (information)</b>	<b>'Check with me' (consultation)</b>	<b>The work to be done (delegation)</b>



# **CULTURE AS A COMPLEX ADAPTIVE SYSTEM**

it isn't  
about  
you

The quality of what you get depends on the judgements your team make about you and their experience.

Therefore the quality of what you get depends on how good you are at sensing what's in the hearts and minds of the people involved.

# Leader-led culture shaping: the model

Culture in this definition means *productivity*, wholehearted *engagement*, the willingness to give *discretionary effort*, *motivation*

How culture is *formed*:

- Three triggers: leadership behaviours, organizational processes, systems, procedures, and organizational symbolism
- Every time an employee (or partner, customer, etc) *experiences* one of these, they have a core, gut emotional reaction – positive or negative
- That drives their motivation
- Furthermore, they will tell stories about their most salient experiences
- These stories drive core, gut emotional responses in others

Culture is *shaped* by changing behaviours, systems, and symbolism over time.

# Leader-led culture shaping: the leader's journey

- Briefing session to understand the model and engage with the process
- Predict the results of the staff survey in their area
- Work in pairs, from the top level of leadership down, supported by you
- Convene listening groups, well planned and well briefed, around *stories*
- Listening *only* – no defending, promising, explaining, fixing
- Partners or you take notes, agree key points at the end
- You produce an overview report
- We meet again to review the report and identify
  - the stories we are hearing now, and the stories we'd like to hear
  - changes to behaviours, systems and symbols that might achieve that
  - an action plan including persistence and consistency

**This is an ongoing learning process**

# Culture as a complex adaptive system

- Leadership behaviour
- People systems
- Organisational symbolism

- Emotional response
- harm • betrayal
  - unjust / disproportional
  - oppression / tyranny
  - subversion • cowardice
  - dishonesty • degradation



# Core human values

'Gut' judgements are made on these scales



Notice that different groups and individuals will evaluate the same situation in different ways against these criteria

Based on Haidt's 'moral emotions':

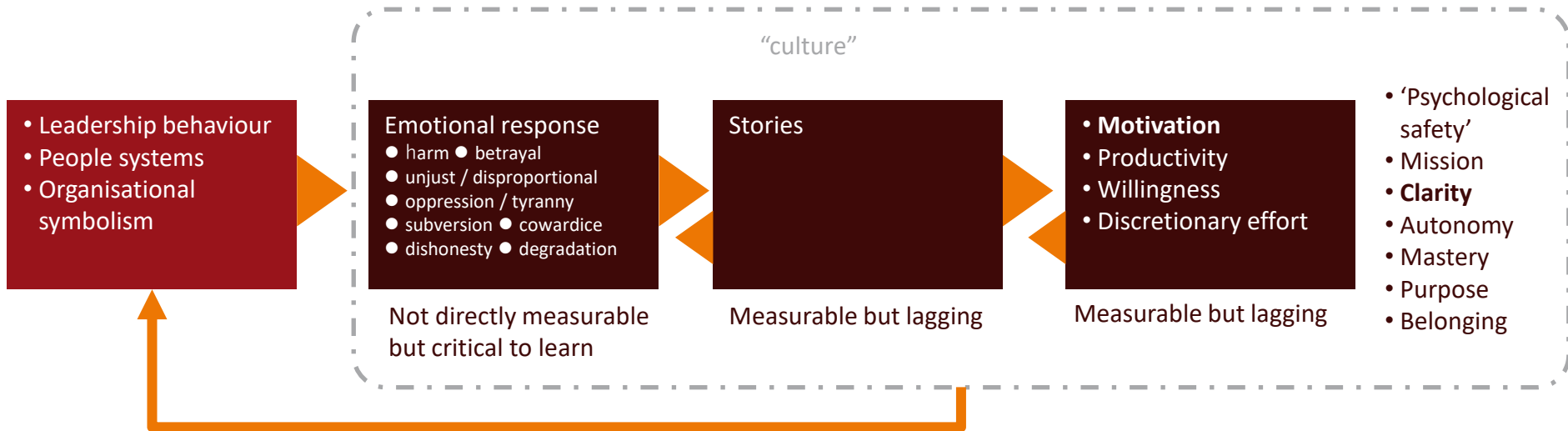
[http://faculty.virginia.edu/haidtlab/articles/alternate\\_versions/haidt.2003.the-moral-emotions.pub025-as-html.html](http://faculty.virginia.edu/haidtlab/articles/alternate_versions/haidt.2003.the-moral-emotions.pub025-as-html.html)

<http://people.stern.nyu.edu/jhaidt/publications.html>

<http://www.ncbi.nlm.nih.gov/pmc/articles/PMC3083636/>

[https://en.wikipedia.org/wiki/Social\\_intuitionism](https://en.wikipedia.org/wiki/Social_intuitionism)

# Culture as a complex adaptive system



**Building two learning loops: understanding and intervention**

# A leader's process of learning and change

1. Understand this complex dynamic process
2. Learn about your system
  - Predict what you have now (metrics and stories)
  - Listen and learn to test your prediction
    - Oh sh\*t!
    - Cognitive dissonance
    - Need to learn
  - Generate desired stories for the long-term future
3. Hypothesise about changes that will help
  - Predict how the change will impact
4. Intervene
  - Expect cognitive dissonance at first
  - Be persistent and consistent
5. Learn!

Repeat...



# **INTENT: PURPOSE AND MEASURES**

# The purpose of a system is what it does (Beer, 2001)

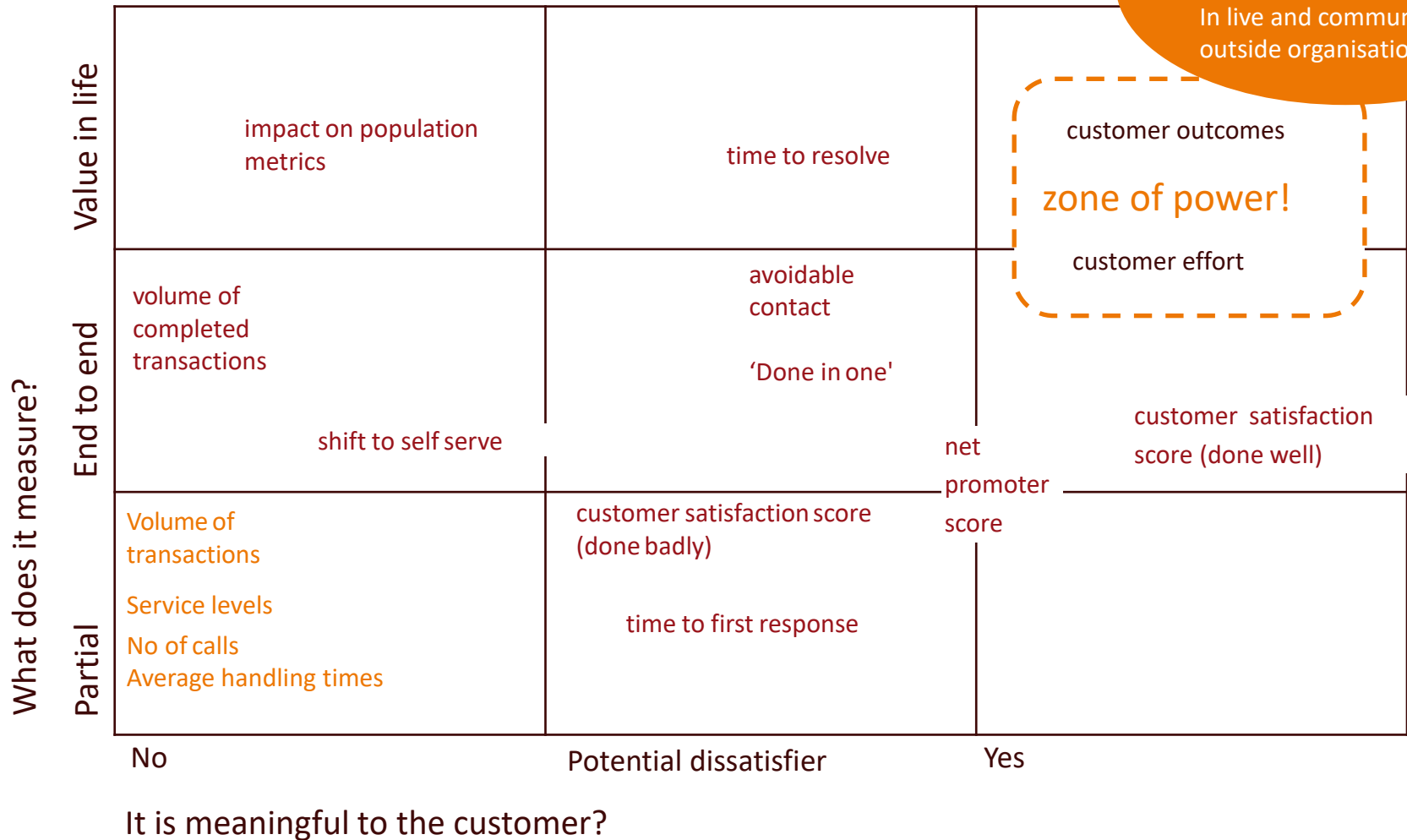
- POSIWID
- Espoused purpose
- Purposeful purpose!



# Measure what matters... to the customer

True public value outcomes

In live and communities – outside organisations





# CASE STUDIES

# Case studies

## **Local Government (UK) - Lack of Honest, Productive Conversations**

A local government in the UK struggled with siloed departments, leading to inefficient service delivery. Introducing structured dialogues helped break down these barriers. The shared effort to improve communication paved the way for a multi-departmental approach to problem-solving, resulting in streamlined services and increased citizen satisfaction.

## **Global Pharmaceutical - Lack of Clarity Practices**

This multinational firm faced crippling project delays due to unclear decision-making processes. After implementing RAEW approach and other practices, accountability was clarified, expediting project timelines and cutting costs significantly.

## **Tech Startup - Lack of Learning and Reflective Practices**

A burgeoning tech startup failed to learn from early failures, leading to high employee turnover. Introducing regular after-action reviews led to an agile work environment that adapted quickly to market demands, attracting higher investment as a result.

## **Telecoms company - Lack of Good and Clear Intent**

A leading telecom company lacked strategic alignment, wasting resources. Implementing a balanced scorecard aligned

departments with the corporate strategy, reducing overhead and increasing market share.

## **Energy Sector (international) - Lack of Honest Conversations & Clarity**

An energy company faced both communication issues and role ambiguity. Comprehensive interventions led to a 15% increase in operational efficiency and a more adaptable organizational structure.

## **NHS Unit - Learning & Culture**

An NHS unit struggling with patient satisfaction scores identified issues with learning from mistakes and culture. Introducing reflective practices and culture-shaping tools led to a 20% increase in patient satisfaction.

## **Retail Chain - Lack of Good Intent & Learning**

A retail chain with misaligned goals and a failure to learn from consumer behavior was transformed by clear KPIs and reflective practices, significantly increasing quarterly sales.

## **IT Consultancy - Clarity & Culture**

An IT consultancy firm facing low employee engagement implemented clarity practices and culture shaping, leading to a 30% increase in project delivery efficiency.



# Core management and leadership practices

'purposeful system'

Good and clear intent

measure and deliver 'what matters' to customers

productive system

Culture shaping

create conditions where people are productive – give discretionary effort

Triple loop learning

relationships

Constructive conversations

learning system

systems

meaning

Clarity

**Address danger / confusion / conflict / deficit / development as they arise**



# OUR OFFER

# What we offer to support your organisation

- Light-touch or in-depth diagnostics
- Top team initial interventions:
  - **Constructive conversations** and clear decision-making from top-down
  - and enabling your L&D people to drive across the organisation
  - **Clarity practice** introduction from top-down or bottom up
  - of role clarity through HR, other clarity practices as required
  - **Learning practices** in leadership and project teams
  - developing ability in change leads to run learning organisation-wide
  - **Culture shaping** from the top down *only* – a cascade where each level in the hierarchy supports and holds to account the level below
  - **Good and clear intent** working with strategy people and KPIs/OKRs from organisational to strategic to individual level – specially silos

Drop me a line if interested – [benjamin.taylor@redquadrant.com](mailto:benjamin.taylor@redquadrant.com)

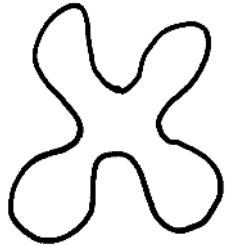


# ORGANISE FOR HUMAN NEEDS

# Robust systems are those that actively balance

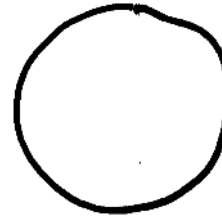
The whole

Differentiate:  
increase ability to adapt



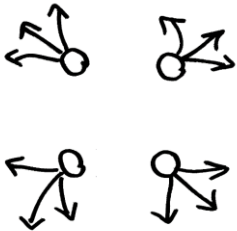
Use the different strengths and capabilities of the different cultures and organisations.

Homogenise: increase stability



Actively learn about all the cultures and organisation. Share knowledge, best practices. Incorporate aspects of one another's cultures and practices.

Individuate: increase autonomy



Put your unique talents on the line. Identify and encourage the full use of the talents of all.

Integrate the system as a whole



Create a compelling system mission. Feed and support one another. Modulate behavior in the service of the whole.

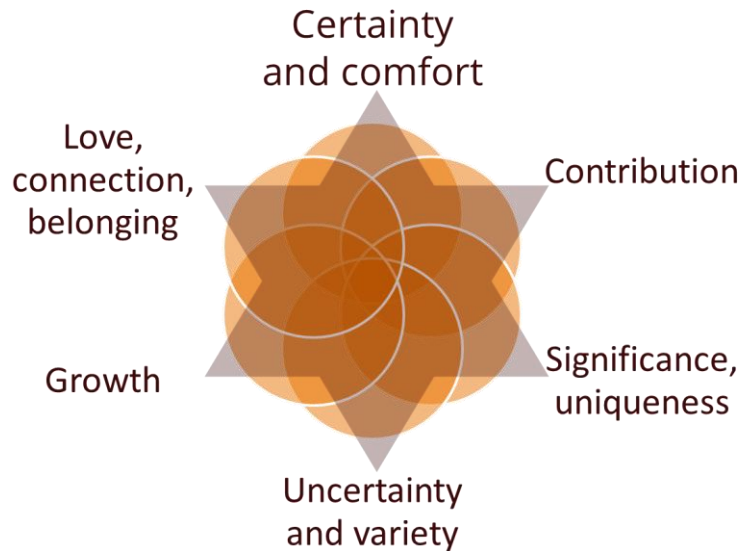
Parts / individuals

**Barry Oshry (Organic Systems) and Stafford Beer (Viable Systems)**

Power, adaptation

Love, stability

# Human and organisational needs ...blue dot distribution!



Core human needs	Organisational needs
<b>Our need for</b>	<b>Is met by, and contributes to, the organisation's need to</b>
<i>Certainty and comfort</i>	Homogenise and create stability
<i>Uncertainty and variety</i>	Differentiate and increase ability to adapt
<i>Love, connection, belonging</i>	Integrate, feed and support each other, moderate behaviours
<i>Significance, uniqueness</i>	Individuate and maximise autonomy

Creating such a context meets the final two human needs— learning/growth, and contribution to value in the world.

## Core human needs

- Multiple sources – I re-developed this myself, but/and, it turns out it totally maps to the model used by Tony Robbins (<https://www.habitsforwellbeing.com/6-core-human-needs-by-anthony-robbins/>),
- Apparently originated by Chloe Madanes: <https://cloemadanes.com/2016/10/12/the-6-human-needs-for-fulfillment>.
- See also <https://pollackpeacebuilding.com/blog/conflict-6-core-human-needs/>
- and [https://en.wikipedia.org/wiki/Optimal\\_distinctiveness\\_theory](https://en.wikipedia.org/wiki/Optimal_distinctiveness_theory)

## Organisational needs

- at a human dynamics level, from Barry Oshry's Organic Systems Framework: differentiation and homogenisation of the whole; and individuation and integration of the parts
- at a functional level, from Stafford Beer's management cybernetics: adaptability and stability of the whole; and autonomy and integration of the parts

# Core management and leadership practices

'purposeful system'

Good and clear intent

measure and deliver 'what matters' to customers

productive system

Culture shaping

create conditions where people are productive – give discretionary effort

Triple loop learning

relationships

Constructive conversations

learning system

systems

meaning

Clarity

**Address danger / confusion / conflict / deficit / development as they arise**

# The RedQuadrant Way tool shed

This framework brings together a set of methods, approaches, practices, tools and frames, set out at more fully in link at bottom, particularly:

- An understanding of organisation functionality (the Viable Systems Model, outside-in demand management and operational effectiveness, strategic and adaptation capability);
- An understanding of human relationships in organisation (Barry Oshry's Organic Systems Framework, systems leadership theory (along the lines of Jacques and Macdonald et al), multiple perspectives, capabilities, and other organisational development approaches); and
- Intervention theory and method.

Cohort-based mentoring, action learning, online/blended learning, meta-contextual approach.



<https://bit.ly/RQtoolshedshowandtell>

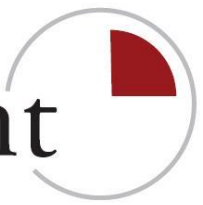


# Dark matter / 'the force' / 'gravity' / 'undercurrents'

- **'The purpose of the system is what it does'** – de facto purpose – we are driven by what we do, not what we espouse
- **Essential organisational logic** which is hidden – The Viable Systems Model shows the requirements for viability and the implications when these functions and capability are missing
- The **inevitability of the shaping of culture** by leaders and systems (process, technologies, habits, rituals, practices, patterns of interaction)
- **'Worlds' matter** – sensemaking and schismogenesis (Bateson and others) - we exist in different sensemaking worlds - which has implications!
- **Dominant/other cultural patterns create system fragility** (Oshry) - we naturally fall into allow/adapt or preserve/protect when we encounter 'The Other' - both of these are sterile and unproductive
- **Human interaction dynamics eat partnership for breakfast** (Oshry) - we naturally fall into different worlds of Top, Middle, Bottom, Customer, and Helper based on our interactions, with implications for relationships within and between these worlds
- **Patterns tend to replicate** across hierarchies, layers in organisation, and time - they are patterns because their nature is to open up the possibility of persistence and even growth and replication, or at minimum, being reproduced
- **Control, framing, paradigms, politics, self-knowledge, and lust for power** - contexts can be manipulated, and will be
- **Human needs and the impact of trauma, shame, and referred pain** - humans suffer and share their most difficult emotions - and put great effort into pretending they do not
- **Structural coupling** (Maturana and Varela / Hoverstadt and Loh) - we are shaped more by our incremental interactions with our environment than our intent
- **Hierarchy and levels of work, human development, and capability** - different people have different capabilities at different times
- **Irreducible complexity** - 'the world' as we attempt to make it understandable is unending nebulosity and potentially infinite pattern
- **It's enabling or disabling constraints all the way down** - to proceed, we have to select our constraints - every extension is an amputation, and every constraint (in organisations, from strategy to measures to programme/project/department to role to task) is both an extension and an amputation
- **Testing in the real world** can be a vital element of seeing and learning how to manage these patterns
- **Geeks, MOPs, and Psychopaths** and **'be slightly psychopathic'**
- Organisational pantomime, the 90/9/1 rule...
- Etc

Also ask me about: cadenced culture: the key to high-performing teams based on trust.

Rituals and practices that help teams to stay focused, productive, and aligned.



## Always happy to talk...

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Blog: [chosen-path.org](http://chosen-path.org) / [antlerboy.medium.com](http://antlerboy.medium.com) / LinkedIn Wednesday mornings

Systems community of enquiry: [www.syscoi.com](http://www.syscoi.com)

[Learn with me in the RedQuadrant tool shed](#)

all links at [www.bentaylor.com](http://www.bentaylor.com)



My short LinkedIn pieces are in red.

**Most recommended reading in bold.**

Most articles and papers available in single folder at [drive.google.com/drive/folders/1TxD3VXGDuC2gT6LUI7IWsirIbJH0](https://drive.google.com/drive/folders/1TxD3VXGDuC2gT6LUI7IWsirIbJH0)

[Vea?usp=sharing](https://drive.google.com/drive/folders/1TxD3VXGDuC2gT6LUI7IWsirIbJH0)

g Direct links are to files within this folder.

For more –Systems Community of Inquiry

[www.syscoi.com](http://www.syscoi.com) has ongoing posts of everything interesting in systems and complexity, and archive

at [syscoi.com/model.report/model.report/newest.html](http://syscoi.com/model.report/model.report/newest.html)

## RECOMMENDED READING

# Five core practices overall

The possibilities of organisation

[https://www.linkedin.com/posts/antlerboy\\_organisation-management-enterpresearchitecture-activity-6762640506850811904-Hc7B](https://www.linkedin.com/posts/antlerboy_organisation-management-enterpresearchitecture-activity-6762640506850811904-Hc7B)

Five core leadership practices

<https://www.linkedin.com/feed/update/urn:li:activity:6742346429211136000/> If you want more

[https://www.linkedin.com/posts/antlerboy\\_five-core-practices-activity-6818796903392784384-WIDi/](https://www.linkedin.com/posts/antlerboy_five-core-practices-activity-6818796903392784384-WIDi/) and

[https://www.linkedin.com/posts/antlerboy\\_leanagileuk-culture-leadership-activity-6821329835034595328-VG44/](https://www.linkedin.com/posts/antlerboy_leanagileuk-culture-leadership-activity-6821329835034595328-VG44/)

[https://www.linkedin.com/posts/antlerboy\\_five-core-practices-activity-6818796903392784384-WIDi](https://www.linkedin.com/posts/antlerboy_five-core-practices-activity-6818796903392784384-WIDi)

Double binds: how do you deal with unreasonable demands at work – when there's no way out?

[https://www.linkedin.com/posts/antlerboy\\_unreasonable-demands-and-double-binds-at-activity-6922445854851137536-sKRU](https://www.linkedin.com/posts/antlerboy_unreasonable-demands-and-double-binds-at-activity-6922445854851137536-sKRU)

**The Leader's Handbook: Making Things Happen, Getting Things Done – Peter Scholtes (book – 432 pages)**

**Total Quality Management – Develin (not really about TQM but about overall improvement) (book –160 pages)**

**Techniques to Match our Values – Marv Weisbord (journal publication – ten pages)**

<https://drive.google.com/file/d/1YzMouS-v1OvuVpjAlsW5yJiAz1ZVGD4q/view?usp=sharing>

**The Little Book of Beyond Budgeting – Steve Morlidge (book – 96 pages)**

**Fourth Generation Management – Brian Joiner (book – 289 pages)**

Freedom from Command and Control: A Better Way to Make the Work Work – John Seddon (book – 216 pages)

Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness – Frederic Laloux (book – 382 pages)

Mastery – George Leonard (book – 176 pages)

# Constructive conversations

What do you think of each other? How dangerous would it be if everyone knew?

[https://www.linkedin.com/posts/antlerboy\\_what-do-you-think-of-each-others-organisations-activity-6876791383877816320-CmKX/](https://www.linkedin.com/posts/antlerboy_what-do-you-think-of-each-others-organisations-activity-6876791383877816320-CmKX/)

The left-hand column exercise

[https://www.linkedin.com/posts/antlerboy\\_redquadrant-the-left-hand-column-exercise-activity-6767713555874742272-M8yo](https://www.linkedin.com/posts/antlerboy_redquadrant-the-left-hand-column-exercise-activity-6767713555874742272-M8yo)

The traffic lights will kill us all one day – unless the watermelons get us first.

[https://www.linkedin.com/posts/antlerboy\\_watermelon-projects-and-target-fixation-activity-6855750735120990208-kbDj](https://www.linkedin.com/posts/antlerboy_watermelon-projects-and-target-fixation-activity-6855750735120990208-kbDj)

**Ground rules for effective groups – Roger Schwarz (article)**

<https://drive.google.com/open?id=1D6KuXHunAn691H5Xh6WzqiRZTqiY0bGE>

**Discussing the Undiscussable – William R. Noonan (book – 288 pages)**

**Teaching Smart People How to Learn – Chris Argyris (article – 14 pages)**

<https://drive.google.com/file/d/1Tv9UX0bmAHQhvVhpmllThrUJvJpj3RW/view?usp=sharing>

**Do you want dirty or clean consulting? – Dr. Richard Claydon (article – seven pages)**

[https://drive.google.com/file/d/1MFs1hb2\\_tgMR5ZqKKtOdgwi-NiNRUfrd/view?usp=sharing](https://drive.google.com/file/d/1MFs1hb2_tgMR5ZqKKtOdgwi-NiNRUfrd/view?usp=sharing)

Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy – Amy C. Edmondson (book – 272 pages)

<https://smile.amazon.co.uk/Teaming-Organizations-Innovate-Compete-Knowledge/dp/078797093X>

Positively Speaking: The Art of Constructive Conversations with a Solutions Focus – Paul Z. Jackson, Janine Waldman (book – 148 pages)

Amazon: <https://smile.amazon.co.uk/Positively-Speaking-Constructive-Conversations-Solutions/dp/095652690X>

RedQuadrant library: <https://redquadrant.libib.com/#3166101X>

Dare to Lead: Brave Work. Tough Conversations. Whole Hearts – Brené Brown (book – 320 pages)

Amazon: <https://smile.amazon.co.uk/Dare-Lead-Brave-Conversations-Hearts/dp/1785042149>

RedQuadrant library:

<https://redquadrant.libib.com/#44187159X>

# Clarity practices

How often do things go wrong because of lack of clarity?

[https://www.linkedin.com/posts/antlerboy\\_redquadrant-the-three-box-model-activity-6747423779552661504-pOiZ](https://www.linkedin.com/posts/antlerboy_redquadrant-the-three-box-model-activity-6747423779552661504-pOiZ)

'Clarity is kindness' says Brené Brown. How do you work on

clarity? [https://www.linkedin.com/posts/antlerboy\\_cport-creative-task-clarity-activity-6807558639147200512-sBEk](https://www.linkedin.com/posts/antlerboy_cport-creative-task-clarity-activity-6807558639147200512-sBEk)

When is 'self organisation'... not? And does it matter?

[https://www.linkedin.com/posts/antlerboy\\_complex-systems-exercise-self-organisation-activity-6904697100676739072-Hi9p/](https://www.linkedin.com/posts/antlerboy_complex-systems-exercise-self-organisation-activity-6904697100676739072-Hi9p/)

Seven steps to heaven – team decision-making in complexity

[https://www.linkedin.com/posts/antlerboy\\_team-decision-making-in-complexity-seven-activity-6724572557435125760-bg-4/](https://www.linkedin.com/posts/antlerboy_team-decision-making-in-complexity-seven-activity-6724572557435125760-bg-4/)

**Brene Brown – summary by Hedwig de Jong (summary – three pages)**

[https://drive.google.com/open?id=1Mv1V0jX72ynJ\\_utMMXhC5FYqturacFak](https://drive.google.com/open?id=1Mv1V0jX72ynJ_utMMXhC5FYqturacFak)

# Triple loop learning

Triple and double loop learning

[www.linkedin.com/posts/antlerboy\\_learning-organisation-improvement-activity-6773204936818872321-jq\\_0](http://www.linkedin.com/posts/antlerboy_learning-organisation-improvement-activity-6773204936818872321-jq_0) Video post: [www.linkedin.com/feed/update/urn%3Ali%3Aactivity%3A6773301685931655168/](http://www.linkedin.com/feed/update/urn%3Ali%3Aactivity%3A6773301685931655168/)

**Learning to unlearn – insights from qualitative study of successful business managers – Petruska Clarkson (academic paper – twelve pages)**

<https://drive.google.com/file/d/1aY5pvPs3OUuXsh7NIOrlyy7XVPWmiJIR/view?usp=sharing>

**Action learning**

[https://en.wikipedia.org/wiki/Action\\_learning](https://en.wikipedia.org/wiki/Action_learning)

**The Anxiety of Learning – Diane Coutu (Online article)**

<https://hbr.org/2002/03/the-anxiety-of-learning>

**Chris Argyris: Theories of action, double-loop learning and organizational learning (journal publication – 23 pages)**

<https://drive.google.com/open?id=1FMrOWbkU0BAJzbDlawwljb6oOZkgNMSZ>

**Action Inquiry: The Secret of Timely and Transforming Leadership – Bill Torbert (book – 248 pages)**

**The new scholarship requires a new epistemology – Donald Schon (journal publication – 15 pages)**

[https://drive.google.com/file/d/1dOOx3Zd7VPWO9PrS21aCrQMkqx3cc\\_Y-/view?usp=sharing](https://drive.google.com/file/d/1dOOx3Zd7VPWO9PrS21aCrQMkqx3cc_Y-/view?usp=sharing)

# Culture shaping

You should never publish your values or behaviours if you want culture change [[culture shaping]]

[https://www.linkedin.com/posts/antlerboy\\_organisations-society-activity-6716964795184119809-h\\_oO/](https://www.linkedin.com/posts/antlerboy_organisations-society-activity-6716964795184119809-h_oO/)

Why do things carry on as they are in business? Why do we block innovation? And what can we

do about it?

[https://www.linkedin.com/posts/antlerboy\\_learning-to-stay-the-same-activity-6932595607807139840-vMNY](https://www.linkedin.com/posts/antlerboy_learning-to-stay-the-same-activity-6932595607807139840-vMNY)

**A Brief Introduction to Systems Leadership**

<https://responsegroup.com.au/wp-content/uploads/2022/07/An-Introduction-to-Systems-Leadership-Theory-1.pdf>

**Walking the Talk: Building a Culture for Success (Revised Edition), Taylor**

**Using 'Systems Leadership' Models to Build a Company – Torex Gold Resources Inc. Fred Stanford, President & CEO, Torex Gold Resources Inc (presentation – 30 minutes)**

<http://globalro.org/index.php/sig/1629-fred-stanford-slides>

**Systems Leadership: Creating Positive Organisations - Macdonald, Burke, and Stewart Theory X Theory Y**

**Model describing human and organisational culture – Douglas McGregor**

[http://en.wikipedia.org/wiki/Theory\\_X\\_and\\_theory\\_Y](http://en.wikipedia.org/wiki/Theory_X_and_theory_Y)



# Intent practices

What was your worst customer experience recently?

[https://www.linkedin.com/posts/antlerboy\\_customer-satisfaction-customer-experience-customer-care-activity-6779671276215762944-400Z](https://www.linkedin.com/posts/antlerboy_customer-satisfaction-customer-experience-customer-care-activity-6779671276215762944-400Z)

Seven deadly sins with performance measure

[https://www.linkedin.com/posts/antlerboy\\_measures-kpis-okrs-activity-6762996659019481088-mpcG](https://www.linkedin.com/posts/antlerboy_measures-kpis-okrs-activity-6762996659019481088-mpcG)

The fallacy of “what gets measured gets managed”

<https://www.linkedin.com/feed/update/urn:li:activity:6803927561735950336/>

Most of the good ideas in customer relations, 'customer relationship management', 'demand management', digital and technology in general are VERY BAD ideas unless you continue to deeply learn what your customers actually need.

[https://www.linkedin.com/posts/antlerboy\\_the-need-to-demand-curve-and-front-and-back-activity-6945269906724564992-HwVI/](https://www.linkedin.com/posts/antlerboy_the-need-to-demand-curve-and-front-and-back-activity-6945269906724564992-HwVI/)

How are you experiencing what your customers experience?

[https://www.linkedin.com/posts/antlerboy\\_mystery-shopping-and-customer-insight-activity-6881858915496161280-K0\\_S](https://www.linkedin.com/posts/antlerboy_mystery-shopping-and-customer-insight-activity-6881858915496161280-K0_S)

The purpose of the system is what it does, the hidden essential organisational logic, the inevitability of the shaping of culture by leaders and systems, and the importance of 'Worlds'

<https://www.linkedin.com/pulse/force-organisational-life-becoming-jedi-beginning-taylor/>

**Stop Trying to Delight Your Customers – Matthew Dixon, Karen Freeman, and Nicholas Toman (article – 8 pages)**

[https://drive.google.com/file/d/1CxanXZFJuJ\\_yU5UXSHeBKG2dtsXI72Pj/view?usp=sharing](https://drive.google.com/file/d/1CxanXZFJuJ_yU5UXSHeBKG2dtsXI72Pj/view?usp=sharing)

**Sense and Respond: The Journey to Customer Purpose – Susan Barlow, Stephen Parry, Mike Faulkner (book – 226 pages)**

**Adaptiveness in human social organisation: some guiding principles – Michael Church (journal publication – ten pages)**

<https://cmapspublic.ihmc.us/rid=1LLD90NQ0-N92GXZ-29CZ/ADAPTIVENESS%20IN%20HUMAN%20SOCIAL%20ORGANISATION.htm>

**I Want You to Cheat! The unreasonable guide to service and quality in organisations – John Seddon (book – 160 pages)**

**Patterns of Strategy – Patrick Hoverstadt and Lucy Loh (book – 406 pages)**

# Leadership

**Unlocking Leadership Mindtraps – Jennifer Berger (article – 24 pages)**

[https://drive.google.com/file/d/1G6SFoI5YnsATXtXXWllwJl\\_zlL6ojGfb/view?usp=sharing](https://drive.google.com/file/d/1G6SFoI5YnsATXtXXWllwJl_zlL6ojGfb/view?usp=sharing) (book – 168 pages)

**Seven Transformations of Leadership – David Rooke and William R. Torbert (article – 13 pages)**

<https://drive.google.com/file/d/1ZXjgxnkhII8988MImB1XXGU M1pvSODV-/view?usp=sharing>

**Eliot Jacques profiled in strategy+business magazine 2001 – Art Kleiner (journal publication – twelve pages)**

<https://drive.google.com/file/d/1j2MJDoCwRS52HT2kRvU7GUjDPaZEXOFV/view?usp=sharing>

**Reaching and Changing Frontline Employees – TJ Larkin and Sandar Larkin (article – 18 pages)**

<https://drive.google.com/file/d/1sA1duu5akg7zYgiQbztby-bO5qqThtK9/view?usp=sharing>

**This era demands collective leadership, not heroic individuals – Neal Lawson (short article)**

<https://www.newstatesman.com/politics/2014/08/new-era-demands-collective-leadership-not-heroic-individuals>

**Transforming Your Organization – Centre for Creative Leadership (short article)** <https://www.ccl.org/articles/white-papers/transforming-your-organization/>

**The Productive Narcissist: The Promise and Peril of Visionary Leadership – Michael Maccoby, Charlie Conrad (book – 320 pages)**

# Other highly relevant stuff

Five questions to get thinking about ‘transformation’

[https://www.linkedin.com/posts/antlerboy\\_five-key-questions-and-the-learning-ladder-activity-6864111312734187520-L8x8/](https://www.linkedin.com/posts/antlerboy_five-key-questions-and-the-learning-ladder-activity-6864111312734187520-L8x8/)

The dance of power and robust systems (article – four pages)

<https://drive.google.com/file/d/1q8jaZRAo4NdbRvP8QTbQ8k6tOfxQXCh9/view?usp=sharing>

Where is your organisation on the learning ladder of purpose?

[https://www.linkedin.com/posts/antlerboy\\_the-learning-ladder-of-purpose-redquadrant-activity-6866641197058928640-pS0K](https://www.linkedin.com/posts/antlerboy_the-learning-ladder-of-purpose-redquadrant-activity-6866641197058928640-pS0K)

Can you take a challenge you are faced with and identify the technical and the adaptive elements?

[https://www.linkedin.com/posts/antlerboy\\_a-adaptive-leadership-technical-and-adaptive-activity-6806111293842583552-6sJJ](https://www.linkedin.com/posts/antlerboy_a-adaptive-leadership-technical-and-adaptive-activity-6806111293842583552-6sJJ)

Some thinking on systems leadership

[https://www.linkedin.com/posts/antlerboy\\_excerpts-systems-leadership-activity-6813360204042792960-B1fF/](https://www.linkedin.com/posts/antlerboy_excerpts-systems-leadership-activity-6813360204042792960-B1fF/)

What does seeing the different worlds that make up an organisation show you?

[https://www.linkedin.com/posts/antlerboy\\_five-worlds-practices-for-system-transformation-activity-6902169851914203136-w5Je](https://www.linkedin.com/posts/antlerboy_five-worlds-practices-for-system-transformation-activity-6902169851914203136-w5Je)

Which world do you live in?

[https://www.linkedin.com/posts/antlerboy\\_publicservices-systemschange-service-activity-6802480342948282368-WUJ-/](https://www.linkedin.com/posts/antlerboy_publicservices-systemschange-service-activity-6802480342948282368-WUJ-/)

Wouldn't it be good if you could improve your chances of successful change? Is your pattern of change interventions on track for success – or failure?

[https://www.linkedin.com/posts/antlerboy\\_redquadrant-how-to-help-your-change-succeed-activity-6820243701751783424-SaHJ/](https://www.linkedin.com/posts/antlerboy_redquadrant-how-to-help-your-change-succeed-activity-6820243701751783424-SaHJ/)

**Sensemaking and worlds**

[https://www.linkedin.com/posts/antlerboy\\_complexity-society-weltanschauung-activity-6734737917031399424-7glc](https://www.linkedin.com/posts/antlerboy_complexity-society-weltanschauung-activity-6734737917031399424-7glc)

**Perspective is everything – Rory Sutherland – TEDx Athens (18 mins)**

[https://www.ted.com/talks/rory\\_sutherland\\_perspective\\_is\\_everything?language=en](https://www.ted.com/talks/rory_sutherland_perspective_is_everything?language=en)

**Punished by Rewards: The Trouble with Gold Stars, Incentive Plans, A's, Praise and Other Bribes – Alfie Cohen (book – 448 pages)**

**Clocks – Dr. Steve Marshall (short article – one page)**

<https://drstevemarshall.com/journal/2019/8/23/clocks>

**Governance: Systemic Foundation and Framework – Ralf-Eckhard Türke (book – 344 pages)**

The Skilled Facilitator: A Comprehensive Resource for Consultants, Facilitators, Managers, Trainers and Coaches (Jossey-Bass Business & Management) – Roger Schwarz (book – 432 pages)

Humble Inquiry: The Gentle Art of Asking Instead of Telling – Edgar H. Schein (book – 144 pages)

# systems | complexity | cybernetics

complexity all the way down

[https://www.linkedin.com/posts/antlerboy\\_organisations-society-complexity-activity-6706817209471254528-gRFK](https://www.linkedin.com/posts/antlerboy_organisations-society-complexity-activity-6706817209471254528-gRFK)

Have you ever been encouraged to 'see the whole', or 'think holistically'? Did it not quite work out?

[https://www.linkedin.com/posts/antlerboy\\_8-things-to-think-about-systems-complexity-activity-6964845434942959616-R3We/](https://www.linkedin.com/posts/antlerboy_8-things-to-think-about-systems-complexity-activity-6964845434942959616-R3We/)

The universe is greebling

[https://www.linkedin.com/posts/antlerboy\\_innovation-growth-cosmology-activity-6790882186502529024-h\\_f9](https://www.linkedin.com/posts/antlerboy_innovation-growth-cosmology-activity-6790882186502529024-h_f9)

Complexity is not a paradigm shift

[https://www.linkedin.com/posts/antlerboy\\_complexity-is-not-a-paradigm-shift-activity-6801048472654086145-nbaD](https://www.linkedin.com/posts/antlerboy_complexity-is-not-a-paradigm-shift-activity-6801048472654086145-nbaD)

**A first lesson in meta-rationality – David Chapman**

<https://meaningness.com/metablog/bongard-meta-rationality>

**Epistemological Crises, Dramatic Narrative, and the Philosophy of Science – Alasdair MacIntyre**

[https://drive.google.com/file/d/1VPkr5mIn8vnBw\\_mMl5rCOgMYroyYCx4p/view?usp=sharing](https://drive.google.com/file/d/1VPkr5mIn8vnBw_mMl5rCOgMYroyYCx4p/view?usp=sharing) (journal publication – 20 pages)

**An Overview of the Soft Systems Methodology – Stuart Burge (article – 14 pages)**

<https://drive.google.com/file/d/1ngzFoLZScboUurv6TF47F3QkgXCh8vpG/view?usp=sharing>

**A Systems Literacy Manifesto – Hugh Dubberly (presentation – 59 slides)**

<https://drive.google.com/file/d/1OHQqAkwL48YM8iB4R7vJqJdLbd8SxmG7/view?usp=sharing>

**Systems One: An Introduction to Systems Thinking – Draper L. Kauffman Jr.**

[https://drive.google.com/file/d/1btuVMWRAIg0PeIXOQJ07ddq0f\\_nTPTP7/view?usp=sharing](https://drive.google.com/file/d/1btuVMWRAIg0PeIXOQJ07ddq0f_nTPTP7/view?usp=sharing) (short book – 48 pages)

**How Wolves Change Rivers (video – five minutes)**

<https://www.youtube.com/embed/ysa5OBhXz-Q>

**If Russ Ackoff had given a TED Talk (twelve minutes)**

<https://www.youtube.com/watch?v=OqEelG8aPPk>

**Complex Adaptive Leadership: Embracing Paradox and Uncertainty – Nick Obolensky**

(Goes to section: a quick test to see how ready your organisation is to exercise polyarchy – a good guide to good role and task clarity) (book – 275 pages)

<https://books.google.co.uk/books?id=MBwSBgAAQBAJ&pg=PA107&lpg=PA107&dq=%22People+are+well+qualified+and+skilled+to+do+their+work%22>

# More systems | complexity | cybernetics

**Thinking in Systems: A Primer – Diana Wright, Donella H. Meadows (book – 240 pages)**

**Simple Rules for a Complex World – Kathy Eisenhardt, Donald Sull (short article – 12 pages)**  
<https://hbr.org/2012/09/simple-rules-for-a-complex-world>

**Images of Organization – Gareth Morgan (long book – 520 pages)**

**Making Work Systems Better – Luc Hoebeke (book – 138 pages)**  
<https://drive.google.com/file/d/17btE9GsAMi2M5j418IgDLhpNoR5IK3rR/view?usp=sharing>

**Navigating Complexity: The Essential Guide to Complexity Theory in Business and Management – Arthur Battram (book – 270 pages)**

**Systems Approaches to Management – Michael Jackson**  
[https://smile.amazon.co.uk/gp/product/030646506X/ref=dbs\\_a\\_def\\_rwt\\_bibl\\_vppi\\_i1](https://smile.amazon.co.uk/gp/product/030646506X/ref=dbs_a_def_rwt_bibl_vppi_i1)

**The Brain of the Firm – Beer**  
<https://smile.amazon.co.uk/Brain-Firm-2e-Classic-Beer/dp/047194839X>

**Safety Differently: Human Factors for a New Era, Second**  
<https://redquadrant.libib.com/#21553244X>

Systems Thinkers – Ramage and Shipp

Systems Approaches to Managing Change – Reynolds and Howell

Systems Thinking for Social Change – Stroh

The Systems Approach and Its Enemies – West Churchman  
Strong Towns – Marohn

Some Basic Concepts in System Dynamics – Jay W. Forrester (academic paper – 17 pages)

[https://drive.google.com/file/d/17FLO1YbRXJsN4wy\\_tNdDbtCRBp0byNkt/view?usp=sharing](https://drive.google.com/file/d/17FLO1YbRXJsN4wy_tNdDbtCRBp0byNkt/view?usp=sharing)

Leverage Points: Places to intervene in a System (article – 21 pages)

[https://drive.google.com/file/d/18lO4QcbqBUhlm0EmtkjeauwDlnhp1H\\_G/view?usp=sharing](https://drive.google.com/file/d/18lO4QcbqBUhlm0EmtkjeauwDlnhp1H_G/view?usp=sharing)

What the hell is systems | complexity | cybernetics anyway?

[https://www.linkedin.com/posts/antlerboy\\_systems-convening-systems-practice-systems-activity-6942014940794789888-c6He](https://www.linkedin.com/posts/antlerboy_systems-convening-systems-practice-systems-activity-6942014940794789888-c6He)

# Barry Oshry's Organic Systems Framework (power+systems)

**The Organic Systems Framework: A New Paradigm for Understanding and Intervening in Organizational Life – Barry Oshry (short book – 60 pages)**

Amazon: <https://smile.amazon.com/Organic-Systems-Framework-Understanding-Organizational/dp/1911193619>

RedQuadrant Library:

<https://redquadrant.libib.com/#52532310X>

**There is no new paradigm – Barry Oshry (article – 17 pages)**

[https://drive.google.com/file/d/10s9btOe8UP\\_3vx4JJRg2SPXcZJyiM39A/view?usp=sharing](https://drive.google.com/file/d/10s9btOe8UP_3vx4JJRg2SPXcZJyiM39A/view?usp=sharing)

**Context, Context, Context: How Our Blindness to Context Cripples Even the Smartest Organizations – Barry Oshry (short book – 158 pages)**

Amazon: <https://smile.amazon.co.uk/Context-Blindness-Cripples-Smartest-Organizations/dp/1911193287>

RedQuadrant library:

<https://redquadrant.libib.com/#26020488X>

**What are human systems? Consequences of system blindness and possibilities of system sight – Barry Oshry (video – one hour 27 minutes)**

<https://www.youtube.com/watch?v=ddl-8zPG0dl>

**Human Systems as Patterns of Systemic Relationships – Barry Oshry (20 minutes)**

<https://www.youtube.com/watch?v=pOe-h5uG97g>

**Barry Oshry London 2015 (37 minutes)**

<https://youtu.be/VYpO-pK7IFA>

# The Viable System Model

Its provenance, development, methodology and pathology – Stafford Beer (journal publication – 19 pages)

[https://drive.google.com/file/d/1CQkzJMbMxRej\\_QN5yax\\_8qnxpHIApNA9/view?usp=sharing](https://drive.google.com/file/d/1CQkzJMbMxRej_QN5yax_8qnxpHIApNA9/view?usp=sharing)

The Viable Systems Model Presentation – Jon Walker and Angela Espinosa (presentation – 42 slides)

<https://drive.google.com/open?id=1s0TTyzYd-wT9MiicXoRq-ir2N5vJ933v>

The Viable System Model and its Application to Complex Organizations – Allenna Leonard, Ph.D (academic paper – 13 pages)

<https://drive.google.com/file/d/1D7KW09osDqHv3GEb13lsj67fOffoOZzf/view?usp=sharing>

Stafford Beer's Viable System Model An Interpretation By Trevor Hilder (journal publication – 49 pages)

[https://drive.google.com/open?id=10DdKEtSal9Ned\\_sQs3Sf\\_rGzzLcAocCG](https://drive.google.com/open?id=10DdKEtSal9Ned_sQs3Sf_rGzzLcAocCG)

Modelling Organisations using The Viable System Model Patrick Hoverstadt & Diane Bowling (article – nine pages)

<https://drive.google.com/open?id=1uMcv6hAVgihtkVZVc7rFNvYLUOwOb7Wy>

The SCiO Organisational Maturity Model – free, easy questionnaire generating interesting results and archetypes

<http://www.scio.org.uk/organisational-maturity-model>

The Fractal Organisation – Patrick Hoverstadt (book – 338 pages)

The Viable Systems Model Guide (journal publication – 94 pages) <https://drive.google.com/file/d/1OdB2AIXzq3aDY-FBEdc9SzgRDaxkiKwI/view?usp=sharing>

# Wicked problems

## Wicked problems

**Managing wicked problems: a primer (short article)**

<https://csl4d.wordpress.com/2013/01/04/managing-wicked-problems-a-primer/>

**Wicked Problems and Clumsy Solutions: the Role of Leadership – Keith Grint (academic paper – 16 pages)**

<https://drive.google.com/file/d/1HvVTUUyhMStQQkoi6iFfmjKWVPCmf1Am/view?usp=sharing> **Prese ntation**

Dilemmas in a general theory of planning – Rittel and Webber

[http://urbanpolicy.net/wp-content/uploads/2012/11/Rittel+Webber\\_1973\\_PolicySciences4-2.pdf](http://urbanpolicy.net/wp-content/uploads/2012/11/Rittel+Webber_1973_PolicySciences4-2.pdf)

Wicked Problems & Leadership – Keith Grint (presentation – 23 slides)

<https://drive.google.com/file/d/18rVf1l6my8vWgrYkunBLPu3MYkM03zE9/view?usp=sharing>

C West Churchman – wicked problems

<https://pubsonline.informs.org/doi/pdf/10.1287/mnsc.14.4.B141>

Wicked Solutions: A Systems Approach to Complex Problems – Bob Williams, Sjon van 't Hof (short book – 90 pages)

The Theory Behind the Practice: A Brief Introduction to the Adaptive Leadership Framework – Ronald Heifetz, Alexander Grashow, and Marty Linsky (long article – 38 pages)

<https://drive.google.com/file/d/1HLP1hIRt6tjiiHVDbGSKhEayulBxjnVc/view?usp=sharing>



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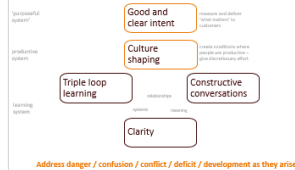
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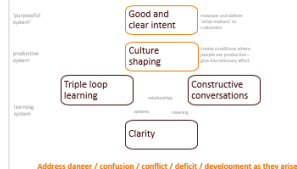
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### The RedQuadrant Way tool shed

This framework brings together a set of methods, approaches, practices, tools and frames, set out at more fully in link at bottom, particularly:

- An understanding of organisational functioning (the Stable Systems Model, outside-in demand management and operational effectiveness), strategic and adaptation capability);
- An understanding of human relationships in organisations (Barry Zenger's 'Organic Systems Framework', systems leadership theory (along the lines of Jacquot and Macdonald et al), multiple perspectives, capabilities, and other organisational development approaches); and
- Intentional theory and method.

Colour based mentoring, action learning, online/blended learning, meta contextual approach.



<http://bit.ly/20c6bbh4ubshedsandall>

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My short LinkedIn pieces are in red. Most recommended reading is in blue. Minor articles and papers available in single folders at <http://www.redquadrant.com/linked-in/> or <http://www.redquadrant.com/recommended-reading/>

**RECOMMENDED READING**

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