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Brief introduction

In a single sentence

Agile organisational development is

- **the step-by-step empirical (further) development of an organisation**
- **through the continuous practical testing of individual changes**
- **and the subsequent assessment of benefits and continuation decision**

- **in a systemic-integral value system and**
- **with collegial and self-organised leadership and organisational principles.**

About this book

What's in the book?

The collegial leadership model includes an organisational model based on self-organised circles (collegial circle organisation), an adaptation and transformation model as well as numerous communication formats.

We use the adaptation model (➔44) to describe a way in which an organisation can gradually adjust agile and collegial organisational and leadership principles. In this sense, it is also a model of transformation.

We use the collegial circle organisation (➔70) to describe an organisational model for agile and collegial-self-organised companies.

And finally, it also includes a whole range of practical communication formats (➔120), for example for moderating decisions (➔103).

We also place equal emphasis on attitudes (mindset), experience (skillset) and tools (toolset).

A number of books have been published in German that cover all these issues in great depth. This book looks at the nuts and bolts of collegial leadership in English.

Who is the book for?

On the whole, this book is intended for readers who want to try out collegial leadership and agile self-organisation in a very practical way - either in their own organisation or by providing external professional support for an organisation.

At the same time, coaches and organisational developers, who already have specialist systemic experience, will probably be able to make much greater use of the systemic principles and the technical terms we use in the book.

What is the best way to read the book?

You can decide just to read parts of the book or jump from one section to the next. We have made this easier to do by including lots of cross-references with page numbers. You can find out more about us and the people who have supported us, for example, on page ➔134. We have also highlighted important keywords and statements for speed readers who wish to skim through the book.

How can I use the book?

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As far as possible, we deliberately use general terms such as "collegial leadership" or "agile self-organised organisational development" because we do not want to restrict or control the dissemination and further development of these ideas by applying trademark and licensing law to any of the content.

And our book texts were written without the help of artificial intelligence. Words denoting any gender include all genders.

Good luck and we hope you enjoy trying it out!

Claudia and Bernd



Why agile organisational development?

What was important in the past (and still is today): Efficiency and productivity

Increasing efficiency and productivity has been the big issue in business for over 100 years:

- The original aim of Taylorism was to standardise processes, for example through assembly line work. This enabled productivity gains of a factor of 10 – 100.
- In the 1970s and 1980s, workplace automation, IT and later robotic process automation grew in importance.
- Since the 2010s, the focus has been on big data, digitalisation and AI.

While it took a lot of capital input to achieve productivity gains in the early days of Taylorism (for example to build factories), the marginal costs of digitalised processes are now approaching zero.

Just as the capital requirements of Taylorism tended to favour larger units, large companies tend now to be the outcome of the age of digitalisation.

Once digitalisation takes hold, companies grow more and more powerful and wealthy, to the point of forming monopolies. They no longer have to reinvest their profits to boost production. They may be able to achieve this for next to nothing as a result of near negligible marginal costs.

Marginal costs

Marginal costs are the costs generated by the production of an additional unit of production or service.

Our organisations are being backed into a corner.

- They have faced the challenge since the beginning of Taylorist scientific management of relentlessly boosting their productivity and efficiency.
- And more recently they have confronted the additional challenge of systematically enhancing their adaptability.



Photo: ID1974/Shutterstock.com

Why agile organisational development?

Current context: Digitalisation and the exploitation of marginal costs

What is digitalisation really about? Digitalisation is mostly used as a collective term for a whole range of developments and has a number of different facets:

- Digitalisation is the extension of automation to the interface of customers, suppliers, business partners and beyond. While in the past an organisation's employees entered data in internal systems, this is now supposed to be done (as far as possible) by customers and suppliers themselves.
- Networking of devices (Internet of Things, IOT) of all kinds.
- "Intelligent" workpieces and production resources: New process paradigms are making production and operating processes more flexible and efficient ("Industry 4.0"). Data ("intelligence") about previous and potential manufacturing and operating steps is now integrated in workpieces themselves.
- Mediatisation: Digitalisation also involves digitising information that was previously stored in physical forms, such as printed books, film DVDs and music CDs. Digitised information is easier to reproduce and disseminate.
- Disintermediation is a business model in which digital processes are used to help eliminate intermediaries. The most familiar use for this business model is the booking of journeys and accommodation, passenger transport, delivery services and entertainment (films, books, music, games).
- Digital transaction platforms bring business partners together in exchange for a transaction fee. In most cases, the platform operators can retain most of the margin as they have exclusive access to participants' data. As the business partners who actually provide the service are easy to replace they often find themselves

in a situation of economically precarious dependence.

- Objectification: Alternative or additional revenue is generated for platform operators by exploiting business and metadata which they sell or rent to third parties. In this case, business partners (and especially customers) are no longer (or no longer the only) players but become business objects themselves: "If a service costs too little, you yourself are the service."
- Another digital strategy, especially of social communication platforms ("social networks"), is platform monopolisation. A social pull is created as soon as the number of users reaches a critical mass. The pressure not to be left out generates almost irresistible pressure to participate and consent.
- Artificial neural networks (AI, "artificial intelligence") are learning to take on more and more communicative, developmental, language and knowledge-based tasks.
- All these business models ultimately make it easier to anticipate behaviour. Machines use big data and AI to make predictions about human behaviour
- or even use these resources to manipulate users (from crude advertising through to subtle personalised and ethically critical manipulations such as fake news and nudging).

Further reading

- ➔ Gerd Leonhard: *Technology vs. Humanity, Unsere Zukunft zwischen Mensch und Maschine*. Vahlen, 2017.

New leadership and organisational foci

The blue area in the diagram on page 7 highlights reductions in costs with the aim of producing more cost-effectively than the competition; the orange area focuses on increasing sales. This is where various digitalisation strategies and business models currently offer the greatest leverage.

Whereas in the pre-digitalisation era, performance orientation was mainly achieved using materialistic target agreements with the aim of enhancing employee performance and getting them to sell more, for example, in the age of digitalisation the emphasis is on making better use of zero marginal costs in business models and envisioning new customer needs for products and services.



Why agile organisational development?

New focus: Disruptiveness and adaptability

Popular terms

Disruption is change based on innovation that supplants something that already exists (business models, industries, markets) and makes it obsolete.

VUCA is an acronym for Volatility, Uncertainty, Complexity and Ambiguity.

Dynamics is a measure of something's changeability.

Complicatedness is a measure of an observer's lack of knowledge and understanding. Complicatedness can be managed by means of knowledge and learning.

Complexity is a measure of the unpredictability and diversity of a system's behaviour. Complexity cannot be mastered; it can only be countered by something else equally complex.

Efficiency is a measure of the cost-benefit ratio, i.e. economic viability.

Effectiveness is a measure of impact that describes the relationship between a defined and an achieved goal.

Taylorism is a doctrine of work organisation and management based on causal relationships.

Agility is a measure of the adaptability and responsiveness of a system as well as a generic term for a set of methods, models and tools for responding to dynamics and complexity in development processes.

Existing market players are increasingly challenged and confounded as it becomes easier to try out new business models. And as soon as new business ideas become successful, they often present a challenge to classic business models or entire industries.

These new business models and strategies generate greater dynamism and complexity for existing companies and forces them to adapt and reinvent themselves.

Our organisations are historically Tayloristic, trimmed for efficiency and optimised for largely stable environments. Many organisations now find themselves overwhelmed by the increasingly dynamic and complex environment in which they operate.

Completely different organisational and management principles are helpful in achieving adaptability to new business conditions, market and competitive situations, technical developments and much more.

External complexity, for example, must be countered by suitable internal complexity:

Because it is hard to know in a complex and dynamic environment when and where which form of cooperation and communication is necessary in a company, responsibilities, decisions, and cooperative relationships must be distributed and designed dynamically for specific situations.

Line organisations with fixed management hierarchies are not built to do this.

Although the buzzword VUCA (see margin for meaning) has been flitting around a lot in recent years, this does not mean that efficiency and performance thinking are obsolete. Bearing in mind the whole VUCA discussion you could easily be forgiven for thinking that it is now all about dynamics and complexity.

But in reality, the business community continues to strive, as it has always done, for ever greater efficiency and productivity.

Focusing on the capacity for adaptability and complexity doesn't mean that there is no place for established efficiency and performance thinking. What it does is focus on describing necessary new skills.

This includes recognising which leadership principles are helpful in specific contexts within an organisation. This is illustrated by the adjacent complexity matrix.

Further reading

➔ Clayton M. Christensen: *The Innovator's Dilemma. When New Technologies Cause Great Firms to Fail (Management of Innovation and Change)*; 2016 Harvard Business Review Press

Why agile organisational development?

Complexity-specific focus on leadership

What this means is that we not only need theories and models for organisational development that facilitate the confident handling of complexity and dynamics, but theories and models with a focus that varies according to the actual degree of complexity involved.

Everything coexists in our organisations. But the focus is likely to shift in different parts of the organisation from time to time.

Companies prefer to rely on principles of performance in all the areas in which they are endeavouring to benefit most from existing and known opportunities. This is how they systematically increase their capacity utilisation and exploit marginal cost advantages.

Advances in knowledge also continue to be relevant and are safeguarded as far as possible through patents, expert retention and the like.

Don't miss the right moment to refocus

It is important to recognise which focus is useful and beneficial to each particular area of an organisation.

For example, if the environmental conditions in a production area are stable, i.e. if no new technologies, competitors, laws or other factors influence value creation in a major way, then the focus can remain on efficiency. Setting the focus further up on the right could be counterproductive in such circumstances.

Another example: If it is not possible to predict which website design for a sales platform will generate the most sales and it is only possible to determine this empirically by carrying out A/B tests (red, top left), increasing the focus on knowledge or performance would probably not bring about a fundamentally better result. In A/B tests, users are automatically shown variants of a webpage to determine which ones perform better.

The biggest challenge for organisations is, to realise when diversity or unpredictability (the two axes of the graph) change and thus require strategic refocusing. In recent decades, long-established companies in many industries only recognised changes late and their significance even later.

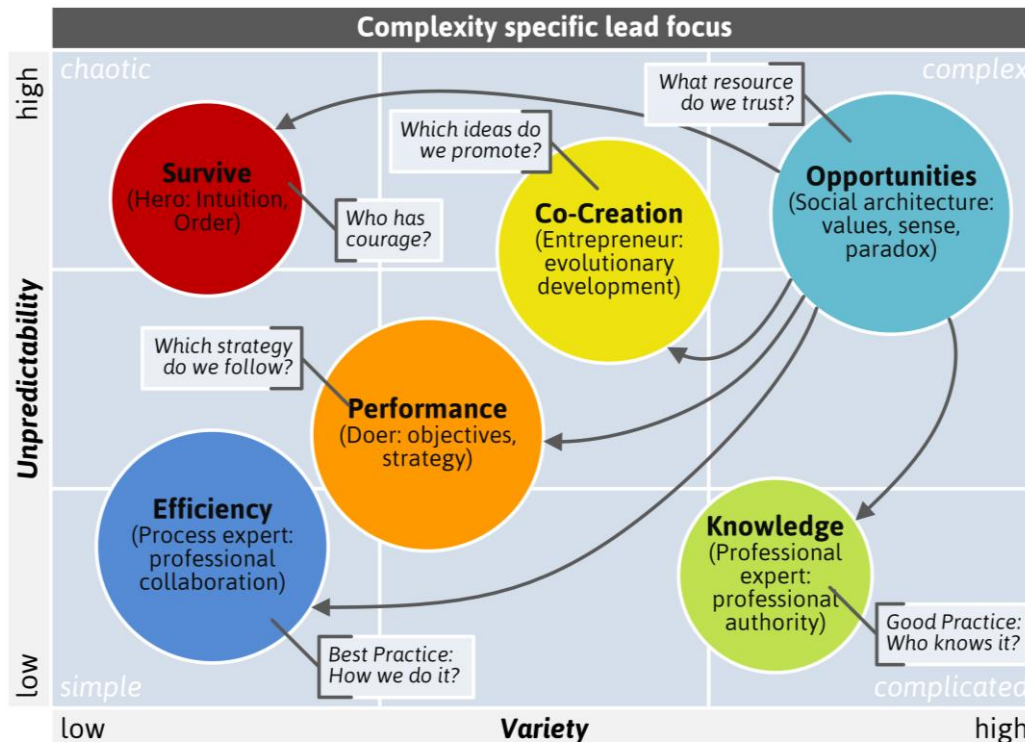


Illustration based on ideas from Heinz Jarne, Frank Boos und Gerald Mitterer (Einführung in das systemische Management, 2014, S. 65ff.) Commercial use allowed when give appropriate credit: Bernd Oestereich, Claudia Schröder (<https://collegial-leadership.com>)



Why agile organisational development?

Why is collegial leadership relevant?

Collegial leadership is leadership work distributed among many colleagues in a dynamic, self-organised way rather than concentrating leadership roles on specific hierarchical leaders. It is not absolutely essential for establishing the complexity-specific leadership foci described above - but it is enormously practical.

The further down the complexity matrix (➔7) the focus is on the lower left, the more likely the advantages of fixed leaders outweigh the disadvantages. In this area, fixed processes and structures, knowledge validated by past experience and known cause-effect relationships are all helpful.

The further up the right the focus is, the more relevant it becomes that the people involved cooperate directly and dynamically with each other, indirect communications would be wasteful in this context.

The extreme difficulty of predicting who has to communicate with whom about what and when in a complex context proves overwhelming for the rigid communication and power relations that commonly exist in pyramid-shaped line organisations. Too many stakeholders whose perspectives are too narrow cost far too much time and deliver far too few robust results.

This is all about the resources we trust:

- Which leadership focus do we choose and which existing leadership and organisational principles are precisely the right ones? In the complexity matrix on page 7 we visualise this aspect with the arrows starting at the top right.
- Or should we go as far as to provoke a pattern switch (➔131), i.e. develop completely new processes and structures? Developing new processes and structures also means changing existing areas of responsibility and power, i.e. leadership roles and positions.

This is where existing leaders are partisan. And where higher-level managers tend to be too far away from the action. In the absence of causal certainty, we must proceed empirically by testing and evaluating options. Instead of the time-consuming procedure of experts passing on their experience to higher-level managers, it is usually much more efficient and effective to let certain decisions be taken at the grassroots level.

- For this process to be at all systematic, we need proven meta-processes and structures of the kind described by collegial leadership.
- It is helpful in all these cases to be guided by common values.

An organisation that is managed in a collegial style of leadership and that has the appropriate meta-processes and structures in place can adopt the appropriate leadership foci more quickly and effectively than a leader-based one.

In a collegially managed organisation, appropriate immediate communication can take place more naturally, routinely and efficiently than in a rigid organisation based on leaders and regimented communication channels, in which communications are mediated by central authorities.

This is why collegial self-organised leadership is a helpful model in the current economic context.

Leadership: Role focused exclusively on providing leadership in an organisation.

Line manager: A manager appointed by a higher-ranking manager to supervise employees further down the hierarchy.

Metaprocesses and -structures: Processes and structures that impact other processes and structures.

Meta leadership: Leadership work which reframes the practice of leadership itself.

Areas in which development methods are applied

The application area matrix shown below describes the application areas of different development models according to

- whether the system to be developed (object, development object) should be primarily understood as causal or complex and
- whether the context in which the system operates and in which requirements arise is predominantly stable or dynamic.

Requirements and context

The reason why traditional development models are increasingly unsuccessful in practice is the outcome of an increasingly complex and dynamic overall context:

- In the field of software development, the limitations of conventional waterfall models

have become more and more apparent since the 1990s. The overall environment has developed faster and more unpredictably than the process models applied by development projects were able to handle.

- Since the beginning of the 2000s, conventional management and organisational models have also proven less and less suitable in an environment which has also become increasingly complex (key term VUCA, cf. ➔6) for companies themselves to operate in.

In terms of the graph shown here, this means that there has been a shift from the bottom to the top.

Development object

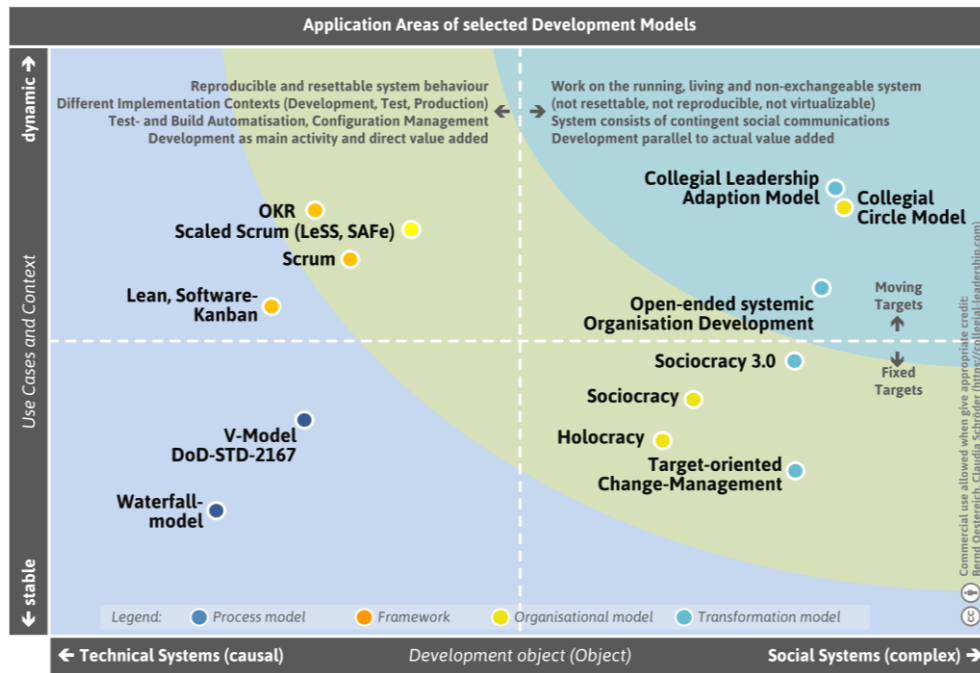
But there is a further interesting aspect, which is represented in the graph by the second axis. The focus here is not on the system environment, but on the system being developed:

- Is it a technical system that behaves in a causal and reproducible manner, as is usually the case with software and hardware systems?
- Or is it a social and thus complex system, as is the case with teams and organisations?

Completely different methods are needed to process a highly complex object (such as a social system) than are needed to deal with a simple or merely complicated object (such as a technical system).

It is important to realise that while development methods such as Scrum are suitable for the requirements that apply in a dynamic context, they are less so for the development of social systems. This is because such methods first originated in the field of software development, with reproducible and reversible system behaviour, different execution contexts (separate development, test and production environments), test and build automation, configuration management and much more.

The exact positions of the different models in the matrix can probably also be imagined somewhat differently - we are more concerned here with fundamental distinctions. We have taken the categorisations (legend) from [DB 2021].





Our influences and sources

The model explained in this book, with its many principles, concepts and practices, has many originators. It is a synthesis of very different and yet complementary approaches. Some have been around for decades, others have only recently become known or relevant.

We have done our best to identify and name all our sources and influences. This is not always as easy as one might think. For example, we may have read a particular text a long time ago or have come across an idea by a roundabout way or from vague secondary literature.

We have also tried to understand who writers themselves have been influenced by.

The historical influences that we outline between approaches and schools correspond to our current understanding. Many of them are well supported by primary and secondary literature, but sometimes they are merely self-evident (in terms of content) and somewhat speculative. And some authors manage to conceal or even remain silent about their sources effectively.

Some sources are specific publications with a definite publication date. From time to time, sources may be more like developmental stages or even a life's work that could also be given quite a different chronology.

The graphic opposite contains the following elements:

- Well-known theories, approaches, ideas and schools, mostly associated with one person or a small group of people (represented by rectangles).
- Well-known, obvious or suspected influences and relationships between these approaches (shown by thin lines).
- Specific concepts and ideas taken from these approaches (referred to in the notes on the lines) that we (try to) use concretely and practically (thick lines).

The graphic shows our personal and subjective perspective in relation to the topic of collegial and agile organisational development. For this reason, some approaches will have inevitably been left out, either because we are not familiar with them, have not understood them or because we consider them

less relevant to the topic or even counterproductive.

We refer to and are familiar with some approaches because they are widely known, but which - for whatever reason - we make little use of in our practice and theory. However, these may well prove helpful and relevant for others.

Similarly, colleagues are working in parallel to us on other models, methods, publications and brands based on similar influences, some of which we have taken into account. Nevertheless, the purpose of the graphic is not to offer an exhaustive explanation of the agile world but just to show *our* influences.

Much of this book is comprised of original material that we have developed ourselves or have come across when working with clients or from others. Above all, we have synthesised and (re-)combined a variety of concepts. For our own understanding, we have also ordered ideas conceptually or clarified and recast them in our own language.

1. A tentative step by small step approach

The agile organisational development cycle

We describe the basic principle of agile organisational development using the Agile OE Loop (graphic opposite).

1. 1. Gaining insights

The process begins by gaining insights. This includes all relevant information on whatever is being observed, such as key figures, evaluations, surveys and all other observations. We become aware of this information. To begin with this information is, if possible, not evaluated.

2. Forming hypotheses

We then form hypotheses, i.e. assumptions about possible causal relationships. Why has something developed in a particular way and become what we initially observed and perceived?

In this way we arrive at possible realities based on the constructivist idea that there is no such thing as the one true or correct reality, but instead individual, multiple co-existing perspectives and realities that must be given at least equal weight at the start. This relieves us of the need to make right/wrong judgements and allows us to form an opinion and grade the potential helpfulness for achieving our goals of different hypotheses and views.

3. Inventing options for action

The hypotheses we select help us to develop possible courses of action: What changes do we want to try out in order to develop the organisation in the way we envisage? In the process we

make no assumptions about causal outcomes. Even if we want our interventions to have a very specific effect, we know that this is merely wishful thinking and that we cannot really predict, or not with enough certainty, what changes will in fact occur as a result of our actions.

For one thing, our assumptions (hypotheses) may be incorrect or less useful than we thought. On the other hand, we are working on a complex system and interactions that are almost impossible to predict. And finally, our ideas might simply be flawed.

We place our ideas for change in the context of our chosen hypotheses so that we can decide which of these ideas we want to try out and in which experimental setting. As far as possible, changes should not be introduced on a large scale in an irreversible way but should be limited, both in time and organisationally, to certain products, processes, roles, teams, areas, locations, work shifts or time windows, for example.

4. Testing changes

The next step is to try out and implement the idea(s) for change. The experimental framework determines who initiates, is involved in and is responsible for specific changes.

Preparation work for experiments also involves considering, and if necessary stipulating in detail, when and by whom the benefits of a completed experiment should be assessed.

Once the experiment has been evaluated and assessed the loop begins again and fresh insights are again sought.

It is important to think carefully before deciding whether actions should be considered experiments, trials, pilots, workshops or whatever. Depending on the corporate culture, other terms may possibly be more powerful and make more sense to all those involved.

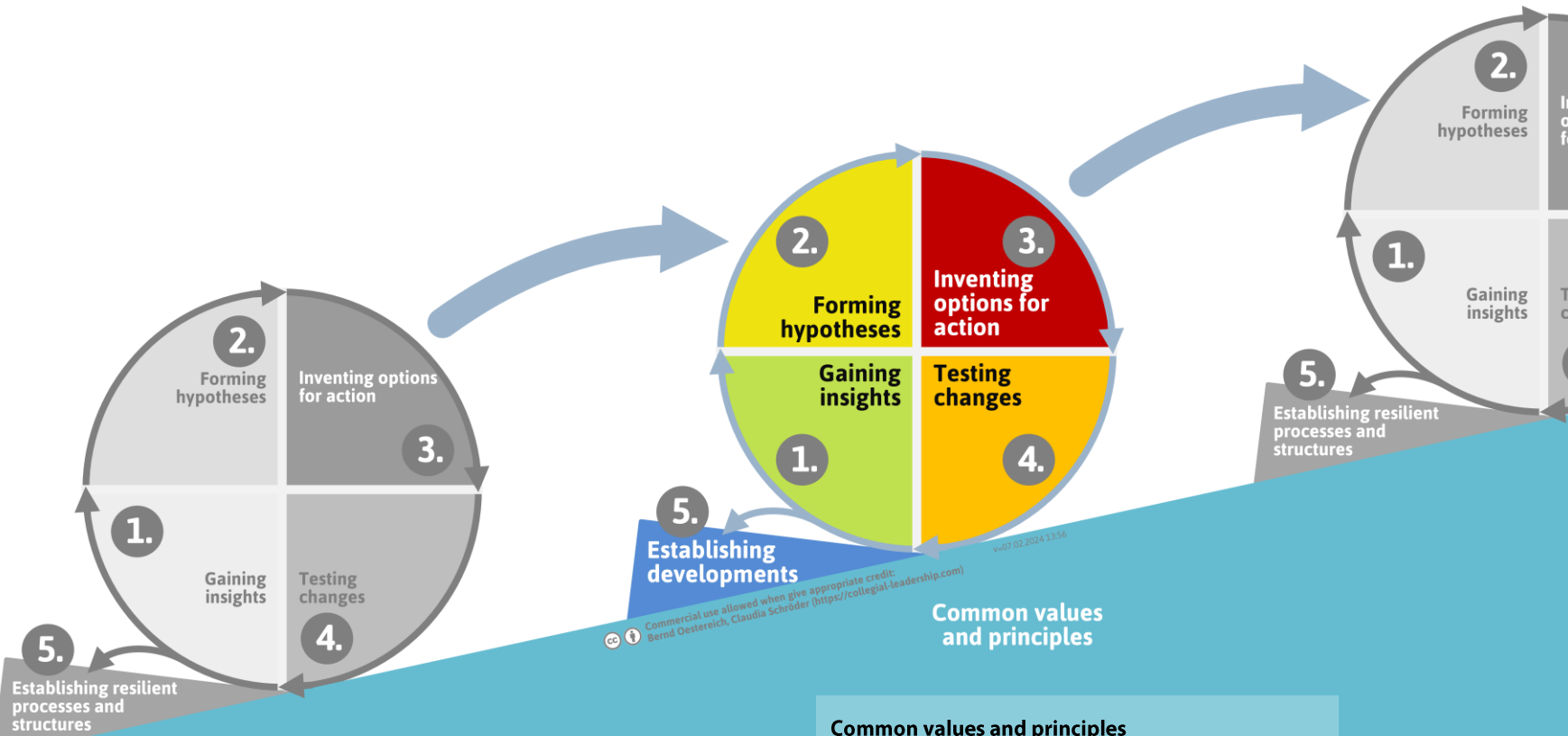
5. Establishing developments

An experiment is a special situation with selected framework conditions and participants in a protected space. Being successful in this context is one thing, firmly integrating and establishing the new and demonstrated skills gained in the organisation is something altogether different.

This requires embedding these capabilities in the organisation's structures, processes and skills. All colleagues, or at least people other than those involved in the experiment, must be able to reproduce the use cases with equal confidence. And not only in trivial cases, but across an entire spectrum of cases that include all the adversities that everyday work brings with it. The idea is to bring about standardisation within the organisation.

This is the wedge that is driven into the visualisation of the agile OE loop to avoid any steps backward and to ensure that organisational development does not become a Sisyphian task.

1. A tentative step by small step approach



Common values and principles

Participants are guided by their own values and principles throughout the entire cycle, especially when forming hypotheses and identifying potential action. Becoming aware of these values and principles, critically questioning and reflecting on them promotes the maturity of an organisation and its members.

1. A tentative step by small step approach

Stepwise development

Importance for the members of the organisation

Changes in organisations affect processes, structures, working tools and principles of cooperation. The employees involved need to understand and practise these. And for this they will need time. To begin with, they are bound to be less efficient and to make mistakes.

It therefore makes no sense trying to introduce too many or too big changes at once or in a hurry. This would only cause more disruptions and result in unhelpful surprises and stresses for the organisation. Especially as unpredictable interactions will also take place between different simultaneous developments.

Even if all those involved would initially welcome the planned changes, employees would be overwhelmed and after a short time would focus on doing their own work properly instead of making the agreed adjustments. The intended changes would then fall by the wayside or would be ignored.

The analogy of "introducing a new organisational operating system" and making an abrupt changeover are therefore often counterproductive. People are not parts of machines that can be given a behavioural update to make them work in a different way immediately.

Employees need time to try out and learn new practices, to acquire and integrate new knowledge, to renegotiate cooperation in group dynamic processes and to experience the meaning of work and effectiveness in a completely new way (➔15).

Significance for planning

It pays to plan for change and development. By planning we gain insights and ideas about the way things interact and possible and alternative ways of doing things. Planning entails preparing ourselves for possible and probable scenarios so that if they do occur, we can react more quickly than if we had never given them any thought in advance.

Although the planning process is helpful, the actual outcome (i.e. the plan itself) is of much less importance in a dynamic context.

Most work contexts are too dynamic for a plan to last long. Most of the time a plan becomes outdated as soon as the thinking process continues.

Particularly if we don't know what will come next, examining potential scenarios can be helpful and enable us to respond more quickly if the worst case occurs. We can form theories about trends, anticipate possible interactions and question our assumptions. But what do we do if our assumptions are incorrect? If one or the other event proves more extreme in its impact that we had anticipated?

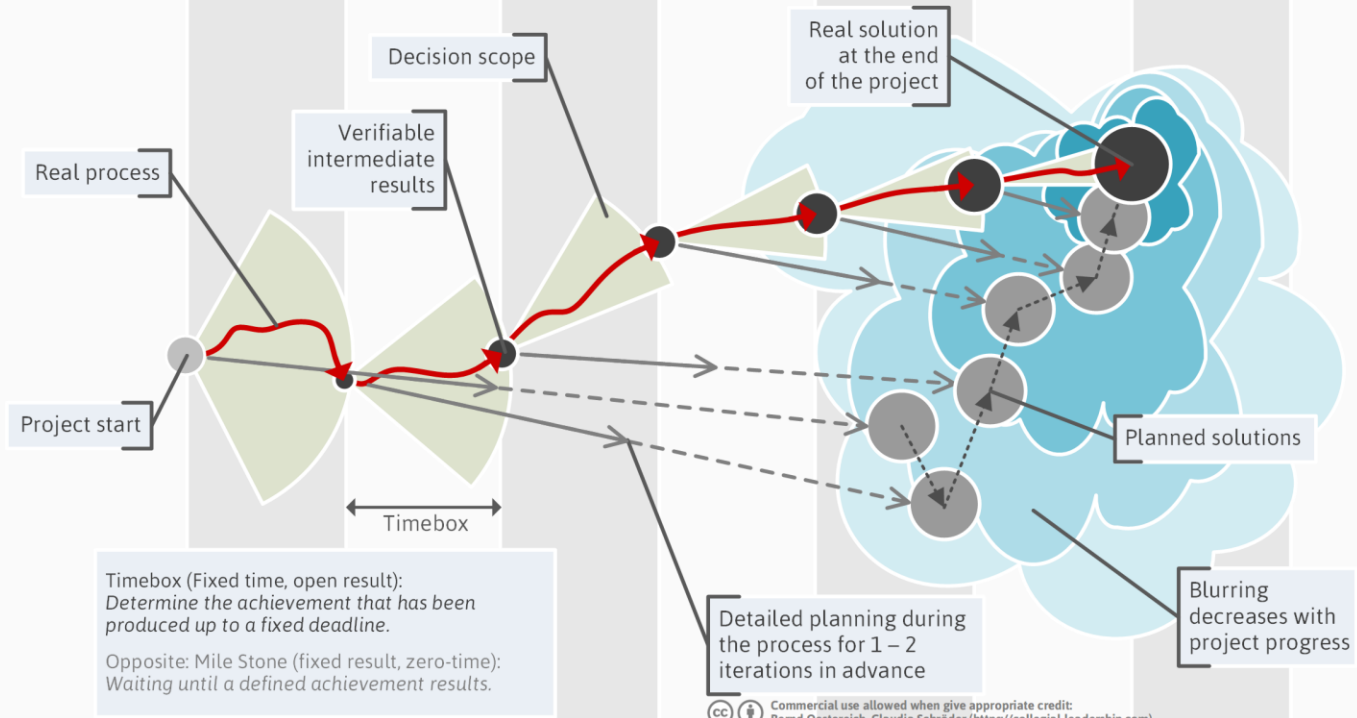
Expecting the lessons learned in the past to provide an infallible guide to the future can be of dubious value. Experience is only useful in forming theories. In the same way, in a complex and dynamic context, it makes no sense to place too much emphasis on ensuring that a plan is complied with. It can be much more helpful to generate new ideas in response to the changed reality.



Go make yourself a plan and be a shining light.
Then make yourself a second plan,
For neither will come right.

Bertolt Brecht, Threepenny Opera

1. A tentative step by small step approach



1. A tentative step by small step approach

Experimental and protected development

Gradual empirical development goes hand in hand with tentative (experimental) development. Experimental doesn't just mean waiting to see what happens (openness to results) and then measuring the outcome (empirical development); it also involves limiting the time and space given to the development step right from the start, i.e. explicitly specifying limits beforehand.

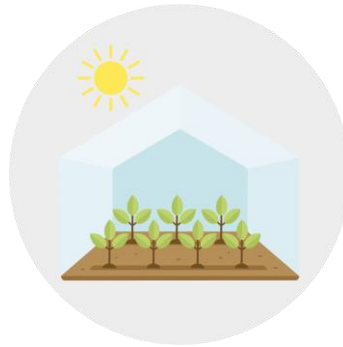
Protection through limitation

This not only means limiting the scope of any action taken to protect the environment from unwanted encroachments. Boundaries also provide a space within which the experiment can be protected against external influences.

An experimental approach is particularly useful in organisational development. A change can first be tried out in one small area or for a certain period of time, for example. This can reduce the risk of unwanted side effects or bad investments. The potential loss is affordable.

It is also usually more pleasant for the people involved to tackle organisational development on a trial basis, as this goes a long way towards meeting their need for security. They are not required in advance to reach a decision in the abstract on whether they support or endorse something, but are given the opportunity to form an opinion based on a concrete experience or example.

This eliminates or reduces the follow-up costs produced by resistance. There will then be less resistance and fewer objections and concerns in the course of development and it will be easier to integrate them in very specific ways. Diffuse compensation needs are avoided.



A good experiment involves determining in advance when and by whom a decision is taken on the outcome and progress of the experiment and how this decision is reached.

When are we ready for what?

This also includes reaching understanding on the following questions: When will we be ready for the experiment? What possible loss can and do we want to afford as an organisation? Will the expected benefit be attractive enough? This is not about developing a payback calculation or a sophisticated business plan. Many companies have left innovation to others because they would rather prove in advance that an idea would pay off.

Resources are always limited, of course, and all potential investments must be weighed against each other, i.e. prioritised. However, prioritisation involves making relative decisions, whereas a business plan is usually based on absolute criteria. Most business plans contain forecasts, i.e. speculations, such as about when the break-even point will be reached and when what profits will be made, etc.

It is usually better simply to be aware of the affordable loss, that is to identify your investment limits and then just to wait and see how things develop.

When do we decide how to proceed further?

An experimental approach also includes a definition of completion: When is a development considered complete and ready for assessment? It also makes sense to agree on the acceptance criteria: Which observations should be drawn on to decide on the progress of the development?

Experiments can also be subjected to requirements, framework conditions and content- or time-related termination criteria that make it easier for those responsible to reach a decision.

Since we are dealing with a complex situation and not just reproducible technical acceptance, such as in software or product development, all those involved need to be aware that the development may throw up unexpected insights that might also challenge the original acceptance criteria.

YAGNI- principle

YAGNI is the abbreviation of "You Aren't Gonna Need It" and is part of the agile development method Extreme Programming (XP). This is the principle of not adding a functionality in a system until it is clear that it is actually needed.

1. A tentative step by small step approach

Empirical development

We cannot expect causal relationships in a complex and dynamic environment. The connections between cause, change and effect are almost impossible to predict. Firstly, things turn out differently and secondly, not in the way you think.

The empirical approach is the only possible way to consciously shape and guide developments. We try something out, observe the effect it has and finally decide whether the attempted change was helpful, should be retained and extended or perhaps abandoned. The principle of empirical development therefore ideally complements the step-by-step approach.



Open-ended development

Many organisational developments are understood as goal-oriented projects. Goals are usually set by a central client and assigned specific target criteria and values. The changes that are made can therefore also be quantified and classified as right and wrong. When development is driven by a plan that includes estimated expenditure, the investment can even be calculated and a business plan prepared in advance.

As we have already seen with the principle of empirical development, there are very few ways available of identifying resilient causal relationships in complex situations. Just as we cannot predict with certainty the specific effect of an intervention, neither can we be certain about the causes of certain perceptible changes.

Investment calculations and business plans can then easily turn into speculative wishful thinking. It is helpful to agree on desired outcomes,

- as long as all those involved can wait in humility for the actual outcome,
- as long as everyone remains fundamentally willing to accept what actually arises as reality, and
- as long as everyone is prepared and ready for unexpected results.

The readiness to be open to results is an important addition to the principle of gradual development and is simply another way of looking (other side of the coin) at the principle of empirical development.

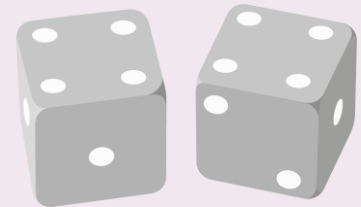
Chance favours the prepared mind.

Giving chance a helping hand

Many business opportunities are also the result of chance and luck, even if other contrary legends circulate after the fact. This is why it is important to allow for fortunate chance and opportunities (➔144, serendipity). Uncertain investments always have to be weighed against possible benefits.

It is therefore advisable to proceed in small steps and approach the goal gradually. In a dynamic and complex environment, medium and long-term planning brings no certainty and little benefit. The ability to respond quickly is much more valuable.

In these contexts, agile companies therefore navigate on sight. They plan the next step, or at most the one after that. They also have less documentation because it quickly becomes outdated and can be misleading.



If a result-oriented approach is nevertheless adopted, the role of a product owner (in the sense of the Scrum product development model) can be helpful in the dynamic prioritisation of a backlog.

2. Collegial distributed and pull leadership

Collegial role-based leadership

Collegial leadership is dynamic and decentralised leadership of many colleagues based on the pull principle and contrasts with centralised leadership by a few exclusive managers according to the push principle.

In the context of collegial leadership, we do not understand leadership as the exclusive prerogative of senior managers who assign work and take decisions by issuing instructions or reaching target agreements. Instead, we use the term leadership work to emphasise that leadership can be a natural and integral aspect of any colleague's work.

Leadership work: Making decisions and taking responsibility are also forms of work, in the same way as production, service and knowledge work.

Leadership, including hierarchical leadership, is necessary. But who takes on what leadership work and when also depends on who is available at any one time, who is suitable and who has sufficient knowledge, skills, trust and interest.

Areas of responsibility are created for predictable and regularly recurring leadership work in the form of roles (or sub-circles). Roles are regularly reassigned among colleagues.

Those who express interest can be authorised to take responsibility for spontaneous decision-making needs and issues by their colleagues on a case-by-case basis.

If the culture of trust allows or the situation requires, colleagues may also assume authority themselves on the basis of commonly agreed values and principles.

Simple principles for action, which we go into in more depth elsewhere (escalation principle ➔ 56), also apply to important (leadership) work that no one wants to take on.

This means that any colleague can become a "leader" - both in general and for specific individual decision-making needs.

It is always the responsibility for tackling problems and tensions that are distributed - not tasks or instructions to bring about solutions.

This kind of leadership work is by default based on the pull principle. Not only decision-making and leadership needs, but also tensions and concerns of all kinds, for which responsibility is not yet clearly defined, are brought to the collective attention of colleagues who then wait to see whether someone takes them on or whether it transpires that they are not sufficiently important.

Further reading

➔ 36 Pull principle

Leadership is too important,
to be left to managers alone.

Bernd Oestereich

We apply two principles in parallel:

1. Organisational principle: Established cooperative relationships

The things that are predictable are distributed in advance and embedded in roles, structures and processes. We establish fixed cooperative relationships that do not have to be repeatedly renegotiated. This is a core organisational principle designed to reduce transaction costs (➔ 145).

2. Market principle: Cooperation negotiated on a case-by-case basis

The unpredictable is negotiated on a case-by-case basis with the aid of fixed meta-processes. This creates a marketplace for leadership and decision-making requirements. We then use typical market mechanisms that enable us to act in an agile way.

Organisational development as concurrent meta-leadership

As we apply both principles at both the operational-content level (work in the system) as well as at the organisational level (work on the system), and do not have to separate the related processes, organisational development simply becomes part of continuous concurrent meta-leadership.

Hierarchy

A large number of people who wish to cooperate always also need hierarchical structures. The difference between collegial leadership and leadership with fixed leaders in a line organisation is that those involved can develop and renegotiate their responsibilities autonomously.

2. Collegial distributed and pull leadership

Multifaceted development

The principle of trial-and-error development already promotes a degree of development diversity. Instead of a lengthy process of consideration, planning and calculating, an agile organisation tries things out within a limited framework and only then decides what should be retained or built on.

The decision threshold is lower because the consequences are initially more limited. It is then sufficient if an idea is good enough to try out and the investment and risks are manageable.

In a complex environment in which it is not possible to determine with certainty, completely and in good time which change is the right one, a broader range of different types of experiment increases the probability that significant developments will be identified.

The more enthusiastically a team engages in experiment, the greater is the likelihood that wholly unexpected results will be produced that turn out to be surprisingly useful. Coincidental and unintentional inventions are also referred to as the outcome of serendipity.

Diversity can be purposely promoted by keeping decision thresholds low and by deliberately enabling and following up parallel and competing developments - up to and including open sporting competition.

It is useful to organise the free exchange of different units' experience with various approaches and solutions. This might, for example, be the experience acquired by one circle or business unit trying out new ways of selecting staff or scheduling shifts.

At the end of the trial phase, each circle reflects on and evaluates its experiences, presents them to the others and in this way facilitates a more qualified decision or change or even convergence around a common standard.

Consent polls and traditional majority decision-making operate in a narrower solution space than polls for objections and resistance.

The choice of decision-making principle significantly influences the diversity and serendipity available to an organisation.

Further reading

➔68 Decision-making tools overview



Wrong decisions can be corrected.

Nondecisions teach us nothing.

John Doerr [Doerr 2018, S. 55]

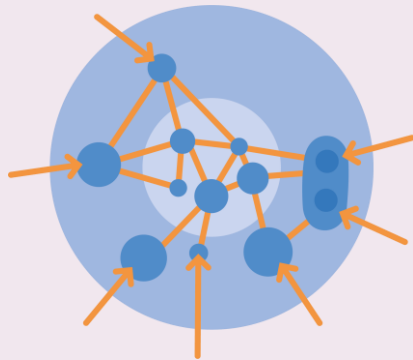
2. Collegial distributed and pull leadership

Leadership from the outside-in

What for?

An adaptable organisation requires

- an environment in which experiences can resonate and be shared, i.e. with customers and the sales market, but also with the labour market, with suppliers, with society as a whole and, as the level of planetary destruction demonstrates to us, with all living beings, in order to recognise what it should adapt to and where it should develop; and
- the authority that colleagues who are in touch with the resonance from the market need in order to be able to develop the organisation and the business significantly on their own and in a self-organised way. This is only possible if they can communicate and cooperate directly and immediately with the colleagues who are useful in each specific situation.



An agile organisation is also led from the outside in: from the market to the innermost leadership.

The direction of value creation is opposite to the direction of leadership. This principle is illustrated by the circular organisational structure model shown (organisational map). The outer ring contains the organisation units called business circle, which are mainly responsible for direct value creation. We therefore also speak of value creation teams, business cells and the like. All the organisation units further inside represent indirect value creation. This includes central service circles such as payroll accounting as well as internal coordination circles.

Leadership from the outside inwards is essential for this model. Units that create value directly are attributed primary decision-making power. They reach decisions on their value creation (products, prices, business models, strategies, suppliers, own staff, etc.) and (at least in principle) on the internal supply services that must be provided by service circles.

Units that create value directly can form coordination circles with other (business) circles for higher-level coordination purposes and in this way share, hand over and delegate some of their responsibilities and decision-making powers.

The business should be led by its markets and customers, not the board.

Taylorist companies are structured quite differently. In these companies, power runs pyramid-like from top to bottom and, what is more, mostly from central departments to the value creation units. This means that the internal IT department, for example, tells the value creation teams which tools they have to work with. In an agile organisation, the value creation teams are autonomous and decide for themselves.

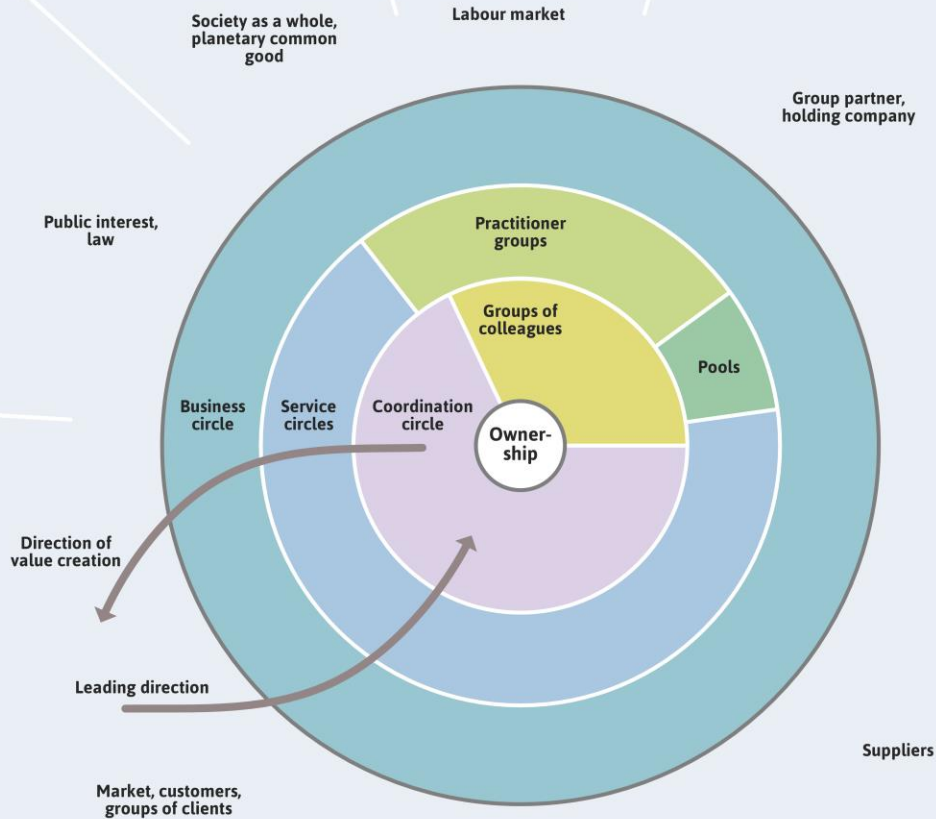
As external organisational consultants, we make sure that the owners and top executives are

- able to grant sufficient freedom and space (time, content, finances) to allow members of the organisation to develop a good balance between efficiency and adaptability, and
- understand, share and support the outside-in leadership focus with all its implications (resonance with the broader setting, internal distribution of power).

Further reading

- ➔ Reinhard Sprenger: *Das anständige Unternehmen*. DVA, 2015.
- ➔ Götz Werner: *Womit ich nie gerechnet habe: Die Autobiographie*. Econ Verlag, 2013.
- ➔ 38 Clear external framework conditions
- ➔ 70 Circle model

2. Collegial distributed and pull leadership



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You can download a print template of this model as a poster from <https://collegial-leadership.com/material-en/>

2. Collegial distributed and pull leadership

Pull development (pull principle)

Thinking at the top, doing at the bottom?

Many development processes are based on the push or pressure principle (push principle), where decisions about what to do next are made by persons or roles other than those who will put the decisions into practice: Thinking at the top, doing at the bottom.

Those who are entrusted with putting decisions into practice are thus regularly given more work than they can possibly do on their own. Negative pressure is created at the bottlenecks.

In most traditional change processes, for example, it is the managers and customers who, with the support of consultants, decide and plan the sequence, quantity and timing of changes and interventions. Implementation by the members of the organisation is then measured against these plans and compared with planners' expectations. The planners and decision-makers then usually attribute any failure to fulfil plans or implement decisions to the people assigned the task of carrying them out. They do not associate failures with their own planning. Because planners and decision-makers are higher up the hierarchy, their views inevitably attract more attention. The constructions of reality that result are often one-sided and unbalanced.

Provoking responsibility through negative pressure

Because this traditional approach separates thinking/deciding from acting/implementing, there is a systematic loss of responsibility. Those whose job it is to put decisions into effect will at best feel only responsible for the outcome of their actions, but not for solving the underlying problem or for the significance of the problem solution. And while managers hold hierarchical responsibility for their decisions, they try to attribute the outcomes to those carrying them out.

Tasks can be distributed and given to others. Responsibility can only be accepted. Anyone who tries to shift responsibility to others nevertheless continues to be responsible until the next person has decided to take it on. All managers are familiar with this phenomenon. Managers then complain that their employees are unwilling to take on responsibility. But these complaints and exhortations remain unheard appeals. The transfer of responsibility is an agreement and cannot be forced on anyone who is fundamentally unwilling to accept it.

The pull principle, on the other hand, is based on the unity of thinking and acting or of deciding and acting. The implementing role decides. The implementing role takes on new work as soon as the capacity for it becomes available and then makes the results of his or her work available to those who take the next steps. Kanban is a prime example of the pull principle. The Kanban method encompasses the entire flow of work from the end to the beginning.

Work calls

Negative pressure creates a pull effect. Responsibility is not distributed or shifted to someone else. Instead, work opportunities and responsibility are drawn to the attention of someone who can then decide to take them on. Work calls. The more that work calls, the stronger the negative pressure or pull effect becomes and the harder it is for people who perceive and feel this pull to resist.

This is why it is so important that, as far as possible, work is not assigned but is perceived immediately by the right people. An employee who receives a complaint directly from the customer will probably not be able to resist the pull of the customer's emotions. Simply displaying the current complaint rate in an abstract form at the place of work will evoke a weaker response.

In an agile organisation, problems are distributed. They call for creative solutions and generate pull.

The pull principle is elementary, indispensable and irreplaceable for an agile organisation.

Without the pull stimulus created by appropriate structures and processes, no proactive self-organisation will occur.

Further reading

- ➔53 Leadership Monitor (Company-Board)
- ➔50 Context bridge

2. Collegial distributed and pull leadership

Empowering development

There is a persistent prejudice that self-organisation leads to completely unproductive and gruelling, endless discussions. Majority decisions have a reputation for generating mediocrity.

Who, not how

For this reason the principle applies of, as far as possible, not discussing *content* or reaching decisions at all in teams or group but instead of empowering one person or a small group to decide on the content.

- We use facilitated and structured communication formats (e.g. discussion marketplace, ➔118).
- We regard decisions and implementation as two parts of an indivisible whole. We avoid burdening others with the implementation of our decisions.
- We authorise one person from among us to gather opinions and ideas on any decision that needs to be taken and then trust them to make the decision for us (consultative case decision, ➔112).
- Or we collect different proposals formulated by individuals and then choose the proposal to which there is the least resistance (resistance poll, ➔104).
- If no one prepares a proposal or wants to reach a decision, we assume that a decision may not be necessary.
- Discussions about content may be helpful in a large group for certain questions and topics: We decide explicitly and in advance whether a topic is important enough to be discussed in a larger circle and who will then organise and facilitate this discourse.

Next level: Self-authorisation

Once a team is practised in delegating decisions and problems instead of trying to reach joint decisions, they can try out the next level, self-authorisation.

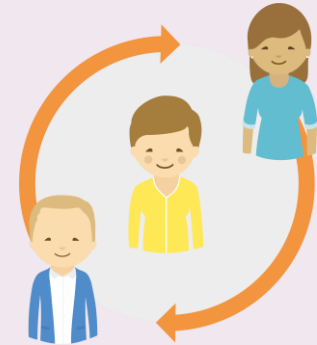
Self-authorisation (in the sense of: "It is better to ask for forgiveness once after the fact than to ask all the time in advance") is justifiable if self-authorised actions are taken in small and easily acceptable steps and the actions and results are systematically reflected upon in order to learn from them together.

Self-authorisation begins with having confidence in the leader. The extent of self-authorised action will depend on how much confidence team members have in the person carrying it out. The joint learning process usually confirms the confidence placed in people and systematically creates new trust.

The more sure all those involved are of their shared values and principles, the more resilient and courageous the self-authorisation will be.

The key requirement is genuine ownership. This means that the persons acting independently must also be able to directly feel the consequences of their actions. For example, if someone hires a new colleague or buys a new machine, they should also have to work with the new colleague or use the machine themselves.

Decision-making and awareness of the consequences must always be united in the same person. If one person decides and someone else has to take the blame, the basis for self-authorisation is considerably weaker.



Handing over responsibility means handing over problems and not instructions.

Taking responsibility means commitment to initiating or participating in follow-up actions to rectify any possible unintended negative consequences of an action.

We separate discussions from decisions so as not to go round in circles.

We choose and authorise decision-makers instead of deciding on content together.

Further reading

- ➔118 Discussion marketplace
- ➔112 Consultative case decision
- ➔104 Resistance poll

Decision-making

Different use cases and scope for solutions

Each decision format has its own characteristics and is more suitable for some applications than others. An important aspect is how much room is opened for solutions.

In politics, we are familiar with the phenomenon that sometimes no decisions are taken at all because the parties cannot agree - even though not taking a decision is the worst solution of all. Organisations would not be agile if they did things this way.

For agile organisations, it is important to make good enough decisions quickly and to move forward step by step. Poor and inappropriate decisions can usually be corrected - failing to decide at all does not move an organisation forward.

The figure shows the size of the space for solutions depending on the decision principle. Classic

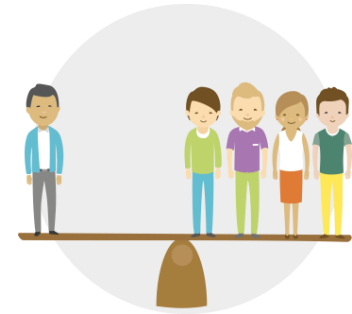
consent polls narrow the space for solutions, while objection and resistance polls open up more space and are more agile - even if the associated negative wording ("How great is your resistance to [proposal]?") takes some getting used to (➔106).

Business research has shown that entrepreneurs also tend to base their decisions on affordable loss, i.e., the risks they can bear, rather than maximum security.

On the other hand, in organisations with weak basic communication skills and a blame culture, restrictive decision-making principles dominate.

All decision-making formats have their own particularities: Whether and how they allow, promote or thwart discussion, opinion formation, expressions of opinion, individual, group and organisational interests, feelings and moods.

Collegial role choice and choosing from the middle (➔108), for example, encourage people



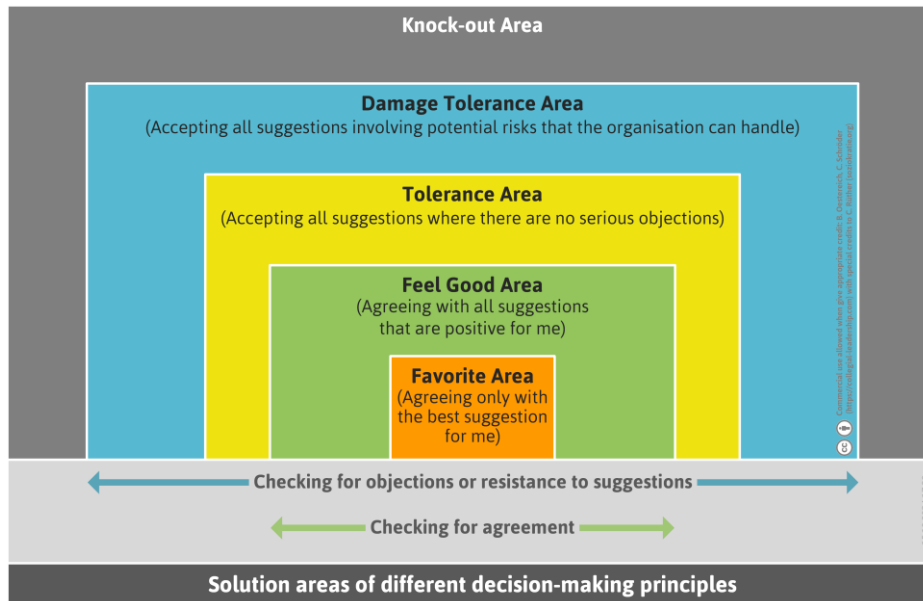
to look beyond the issue level. The objection integration format (➔114) opens even more levels.

It is not a matter of substituting feelings or non-objective statements for facts, and of getting bogged down in emotional discussion. It is much more to do with acknowledging the existence of the lower levels (cf. iceberg model ➔92) and then ensuring that the resulting communication is strictly moderated. Speaking in rounds is a good example (➔120).

In other formats, we also let participants and the group work out and distinguish whether any tension that may exist is more about an individual need, a group interest or the organisational purpose (➔116, theme-centred objection integration).

In this way, we open the space beyond the purely factual level while ensuring highly disciplined, structured communication with a new focus on semantic distinctions.

Conflicts that may arise during the decision-making process - or that may have existed before but have only now become apparent because space has been created for more communication - need to be dealt with in separate conflict resolution formats.



Resistance poll

In a resistance poll participants rate their resistance to different proposals on a multi-level scale. The alternative that meets with the least resistance is consented to.

Where it makes sense, the status quo ("everything stays as it is") is added as a default solution, so that the process is applicable even when there is only one substantive option to be decided. Resistance polling can also be used to prioritise alternatives and role selection.

An extension of the resistance poll is the universal decision-making procedure (➔107).

Systemic consensus

A very similar and valuable process is systemic consensus building. We use the term resistance poll here because most people can spontaneously imagine what it means, and systemic consensus building sounds a bit cerebral.

➔Georg Paulus, Siegfried Schrotta, Erich Visotschnig: *Systemisches Konsensieren*. Danke-Verlag, 2009.

Preparation and invitation

First, a person is appointed to facilitate the process.

If participants are expected to prepare for the upcoming decision, e.g., by gathering information or preparing their own proposals, the need for a decision should already be communicated in the invitation to the decision meeting.

Understanding the need for a decision

The meeting-facilitator first asks the person who has expressed the need for a decision to briefly present their concerns and proposal.

Sometimes several people seem to have the same or a very similar concern. To avoid confusion, only the concern of the person who initiated the decision should be dealt with. It helps if the person making the request is next to the meeting-facilitator so that they are clearly visible.



After the presentation, questions and misunderstandings can be clarified in a round (speaking in rounds ➔120). As far as possible, these are clarified with the person making the request directly, unless he or she involves other people.

If anyone in the group wishes to state the need for a decision differently, in whole or in part, they are asked to do so immediately in the form of a proposal for a decision. For example: "I propose that we postpone the decision and first form a working group to discuss in more depth what decision is needed."

Opinion round

Participants are now asked to express their opinions and ideas in a round (iterative) format.

The meeting-facilitator should then briefly check whether they want to press ahead with the process. If it becomes clear that the problem or ideas for solutions are still too vague or weak, the meeting-facilitator can decide to move to another discussion or decision format (immediately or later) or let the group decide.

On the other hand, if the conditions are right, it is also possible to skip the opinion-sharing round so that proposals can be collected straight away.

Collect proposals

The meeting-facilitator asks all participants to formulate their proposed decisions, e.g., on a sticky note or flipchart, and briefly present them to the group.

The following questions help to check the quality of the proposals:

- Who will be responsible for implementation and the consequences of the decision?
- Is the proposal complete and realistic? Do we know the relevant prerequisites, framework conditions, partners, supplier services, dependencies, etc.?
- Do the expected benefits have a specification and time frame?
- Who reflects on the benefits actually achieved, when, and on the basis of what criteria?

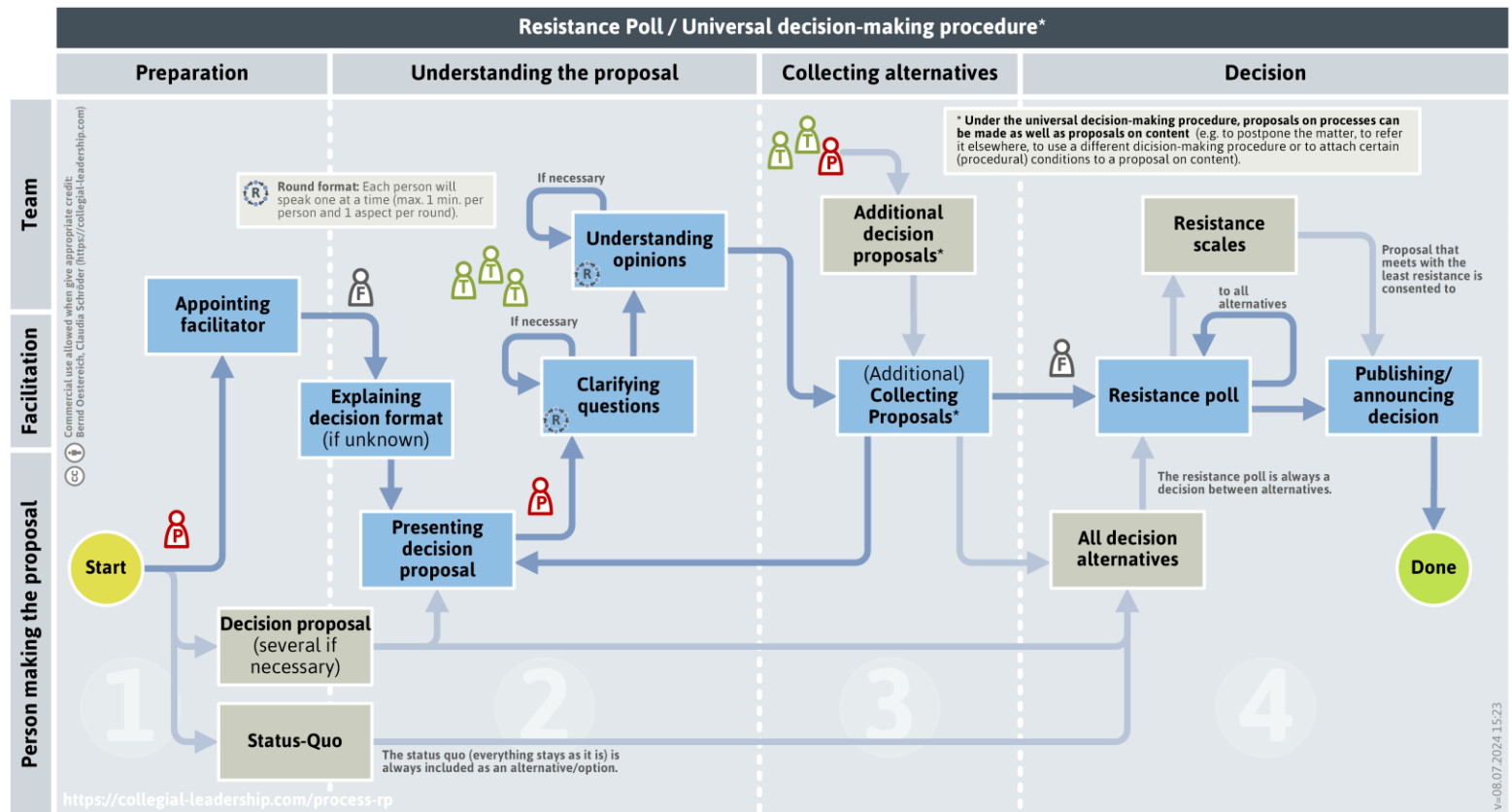
The status quo ("everything remains as it is") is always included as an option, unless it is logically impossible.

For all other suggestions, the meeting-facilitator will ask whether they are under-specified, incomplete, illogical or impossible, and will eliminate them if necessary.

Resistance poll

Once all options have been presented, the meeting-facilitator asks about each proposal in turn: "How much resistance do you have to this option?"

A multi-level resistance scale is used. A pragmatic scale is the five-finger query (➔106). Abstentions do not count. They are always counted as "no resistance", i.e., with the lowest resistance score.



Scoring can be done in different ways (including anonymously):

- Show of hands (five-finger query).
- Electronic poll via app (Mentimeter, Slido etc.).
- Collect score slips.
- Write score in a chat.

Polls can be done openly or secretly.

Evaluation and result

The meeting-facilitator documents and reads out the proposal with the lowest resistance score. This is then accepted.

If there are equal levels of resistance to a proposal, it does not matter which alternative is accepted - they are equally good. It can be decided by chance, by the youngest person present, or by a run-off vote.

To avoid loss of face and hurt feelings when people are being elected and so on, these votes should be counted confidentially and anonymously. Only the elected person(s) is named, without revealing the order or opposition scores of the other candidates.

Resistance poll

Why a resistance poll?

What makes a resistance poll so special and why is it asked negatively? Resistance polling combines a number of characteristics.

- Relative scoring (instead of yes/no poll).

A vote is not taken on a single proposal, but always on a set of alternatives, that always includes the current state of affairs.

Classic majority decisions ask who is in favour of a proposal. If there are several competing proposals, they are usually voted on individually, so that if no proposal has a majority, there may be no progress at all at the end.

With a resistance poll, this works differently because exactly one proposal is always selected from a set of options. Only if the status quo is selected does everything remain as it is. However, this is much less likely because all the proposals on the table are evaluated relative to each other.

- More diversity, motivation and creativity.

When it is clear in a classic majority decision that a proposal will not get a sufficient majority anyway, it is easy to sit out problems and remain passive.

However, the situation is more challenging for participants if one of several options is always chosen, i.e., if there is always a realistic possibility that the status quo will be replaced by something new. This is because those who do not make or support constructive contributions (proposals) leave the future to be determined by others. Pull is created.

- Differentiated instead of polarised opinion polling.

Instead of two answer choices (yes, no), the resistance poll uses a scale, usually a 5- or 10-point scale. This makes more differentiated decisions possible and more nuances visible. Stakeholders tend to value different options in different ways, for example, a proposal may be seen as sub-optimal but still acceptable. The scale question gives them the opportunity to express this.

- This effect should not be underestimated, because it considerably broadens the scope of possibilities. Not only the favourite solutions remain, but also those that may only partially correspond to one's own opinion, but are quite acceptable and, for example, at least better than the status quo.
- Prevent deterioration.
- Because the current state of affairs is always one of the options, all other proposals are always evaluated in relation to the status quo. It thus becomes clear which options represent an improvement and which a deterioration compared to the status quo. This prevents a solution being chosen that is expected to lead to a worse situation.

- Ignorance and disinterest have less of an effect.

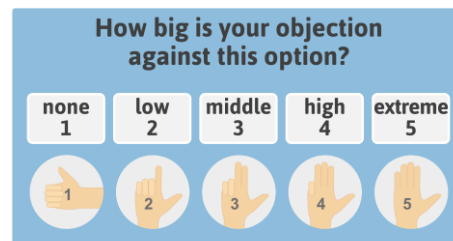
Complex decisions often require specialist knowledge and training, which sometimes only a few of the decision-makers have. Someone who does not understand a proposal is more likely to vote against it. Unqualified and poor decisions are more likely to prevail when experts are in the minority.

This becomes particularly clear in personal elections: We may be asked if we are *for* a particular person, even though we have no specific reasons for being *for* someone we may not know. This person may consequently receive less support.

On the other hand, if we ask for reasons not to vote for someone, we may find that we do not have such specific reasons either, precisely because we do not know the person.

- So, it may be possible to create more space for a solution if it is possible to work out the resistance that may exist towards someone.

Because of the show of hands, the time required increases proportionally to the number of proposals. In practice, up to five different proposals (in synchronous meetings) can be handled efficiently. If there are too many alternatives, we recommend pre-filtering using a prioritisation or scoring process or asynchronous voting with a digital tool.



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Part 4: Meta information

This section contains a bibliography, an index and information about the authors.

About the authors and this book



Authors

In the first decade of this century, we noticed that the existing organisational and management practices in our own company were increasingly out of step with the needs of the market and employees. But we still lacked reliable models and templates for doing things differently.

Before leadership could become a natural part of the work of every member of our organisation, we had to experiment a lot, find the right theories, develop many of our own practices and principles, and recognise many mistakes.

In 2010, we started to hand over the management of our company to our colleagues, and a little later we replaced all managers with collegial leadership. Finally in 2014, we sold the company to the employees.

Thanks to the management and organisational principles we introduced, our colleagues have been able to continue working without us ever since - successfully and resilient to crisis. And we have since used our new freedom as ex-entrepreneurs to help other entrepreneurs and their organisations experiment with collegial and agile leadership principles.

After we published the first books on the subject in 2016 and 2019, many organisations of all sizes and from all sectors have tested the collegial leadership model and adapted it to a greater or lesser extent. We were able to accompany some organisations and gain further first-hand experience.

At the same time, we have been able to support many hundreds of systemic organisational developers in further developing their skills and knowledge of agile and collegial organisational development. The Agile Organisational Development Guild (<https://agile-gilde.org/>) emerged from this circle as a professional association.

We are currently sharing our entrepreneurial expertise in this area by providing tailored support for transformation and adaptation processes in businesses.

You can find out more about us and our work on our website <https://collegial-leadership.com>.

If you feel encouraged by this book to simply get started without further training or advice, then it has served its purpose.

We look forward to receiving your feedback, even if we may not always have the time to respond (book@collegial-leadership.com).