

Interview: Unity's Holacracy Implementation

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With: Susan Beck and Dr. Gary Simmons of the Association of Unity Churches

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(See: 'Interview: Unity's Holacracy Implementation'; 60 min)

Summary: In this interview, Brian Robertson speaks with Certified Holacracy Practitioners Susan Beck and Gary Simmons about their adoption of Holacracy at the Association of Unity Churches. Listeners will find the background challenges described common to companies of many types and sizes, in both the for-profit and non-profit sectors, and will hear how Unity implemented Holacracy to address them. Susan and Gary also share the challenges they ran into during the implementation process, as well as the benefits the organization has now realized as a result. The interview concludes with Susan and Gary's advice to other executives considering a similar journey.

NOTE: The interview begins with some informal chatting, then transitions into the discussion on Holacracy, as follows:

Brian Robertson: Oh, that's exciting. If it's okay with you I thought maybe we could start by you giving an overview of the organization and then from there I'll just start asking a few questions and then drive you through the whole story.

Susan Beck: Well, because I know this call is being recorded I might say that I'm Susan Beck and I'm the Chief Operating Officer of our Association of Unity Churches International and with me is Reverend Dr. Gary Simmons. And we're both facilitators. Gary is the Assistant Vice President for Integral Operations here. We're both facilitators for Holacracy and we got this idea back in September of not last year [2008] but the year before it [2007] that we wanted to implement Holacracy within our organization and Gary and I kind of looked at each other and said, "Let's make this happen." And so, as you know, we went to your training back in January of last year and have been successfully implementing ever since. And I wouldn't say it's been without some bumps in the road, and I'll let Gary fill in the details there, but we received the training and then we came back and did a presentation in February for our leadership team. We actually led them through an exercise where we actually developed some roles and accountabilities. I picked up some accountabilities during that meeting and they were very impressed with the process and they were then supportive of the training that we had setup with you all for our entire staff here in May of last year.

We didn't do much, really, between February and May, except for the fact that as soon as we came back we started transforming our meetings so that the meeting would be in alignment with the processes that you all had taught us. And so, we changed our tactical meeting and found that we were getting a lot more done. We started doing some stand-up meetings and things like that. And that was really helpful for us because we had been having some really ineffective meetings and, you know, we were able to really move through things a lot more quickly even though we hadn't implemented Holacracy at that point.

So then in May we had the training, with you all. And we really weren't able to do much after the training because we had our major annual convention coming up and we were out of town and out of pocket,

really, for most of June. And we really didn't really get involved again with Holacracy implementation until the very end of June or early July. So I guess you could say we've been implementing since July.

And initially what happened is that Gary and I were facilitating the meetings and then we taught a cadre—once the folks got elected—we taught a cadre of people to be facilitators and we continued to sit in with them, and coach them, and critique them. Some of that still continues but for the most part our facilitators are autonomous now and doing a really great job of facilitating. So we now have all our circles up and running. We have one leadership circle, which you would consider the General Company Circle [GCC]. And then we have four subordinate circles. We don't have any other circles in those four circles yet. But we're a very small organization. We only have about 40 people here so we're being very careful about splitting off really small circles that would have a hard time being effective.

So anyway, we're into implementation. We've gone through several cycles. I think you've said anywhere between four and six cycles of governance so that people have a chance to go through this process and get real familiar with it. We're certainly there. Some of our circles are in better shape than others, you know, as far as their ability to handle the process. But for the most part everyone is executing the process and I would have to say that it's very effective, especially at the leadership circle, where we've gone by leaps and bounds to really make everything much more explicit in bringing tensions forward and people are feeling, I think, good about the process and knowing that they can get things done. So we are... from the leadership standpoint, especially from the Chief Operating Officer standpoint, I can really see the difference it's making in the organization already.

So now, I'll kind of let Gary tell... you know, fill in the blanks, or contribute anything he wants to contribute. That's kind of a run down of where we are right now.

Gary Simmons: Just a little bit of context. The Association of Unity Churches International is a not-for-profit spiritual service organization. We have about 900 affiliated independent, autonomous member ministries and so our home office... when we describe our practice of Holacracy, we're primarily talking about what we're doing here at the home office as headquarters for our international/global organization. And our hope is that we create a model practice so that our affiliated member ministries and partner organizations will be so inspired by what we're capable of demonstrating through the practice of Holacracy. So we're highly motivated and committed to the practice and, as Susan has described, we have worked with our best efforts to have our home office embrace it completely. We've experienced lots of benefits and, as well as, new challenges that ultimately are moving us forward—so a lot of great things to say about it.

Brian: Yeah, well I definitely want to dig into that. Let me start just to re-cap. So you've got about 40 people there in the home office organization. And you are planning to roll it out now across, or inspire, member churches—900 or so—to adopt once your home office becomes an exemplar of what this practice can look like and you've proven out the benefits and can show them that.

Susan: Yeah, well actually what we're really planning to do is—you know, we're working with the home office now, as you said—but then we need to take it out into our regions. We have regional offices which are not staffed. Those are kind of volunteer positions. In most cases there's some basic staffing but in a lot of cases it's ministers who are in our churches who are also serving in regional positions. And so we'll take it out into the regions and work with the regions, and have regional circles and such. And then get it out into the churches.

We actually have a pilot program that's going to be up and running starting in September of this year [2009] and we'll be taking it into the pilot churches first. So we'll probably look at a pilot region or two, and then pilot churches. And, also, one of the things that you were aware of is that our board is not connected to us yet in Holacracy and that's something that really will be done hopefully this year [2009], is that the board will go first and then all the others.

Brian: So let me rewind the clock back a bit. When did you guys first learn about Holacracy? I know both of you attended our very first facilitator training in January of '08. But tell me what inspired you to go there in the first place. Where was the organization and what challenges were you facing that you were hoping something like this might resolve? Or what opportunities were you sensing that you wanted to capture? What got you into that training in the first place?

Gary: The story is almost a personal story between Susan and myself. I was working on my Doctoral dissertation in 2006 where I was seeking to apply Ken Wilber's Integral theory to issues of church growth and development. And in the course of my literature search, and in my attempt to apply Integral theory to church growth and development, I discovered Holacracy in my research and began to see the possibility of it being the Integral Operating System for the Integral organization. That's the way I characterized it.

And in the course of considering the organizational benefits of such a practice, once our organization got to the point where it subsequently hired Susan Beck as the COO of our organization, I had an association with Susan prior to her employment in part to help pick her brain with regards with some of my interests in so far as my dissertation was concerned. But I discovered that she also had heard of Holacracy. And in that moment where we both discovered that we actually knew something that probably nobody else on the planet knew, and that there were two people in the same room who had that same information—it suddenly clicked for us. And Susan was hired specifically for the purpose of helping to shift the organizational culture and we immediately saw that Holacracy was the perfect thing to help inspire those shifts. So that's my end, my part, of the story.

Susan: Yeah, for me, I learned about Holacracy back in 2006, actually. I learned about it at the end of 2006 by someone... one of the Integral New York Integral Salons sent me an email and knew that the company I was working with in Omaha that I, you know, we were really doing work with Ken Wilber Integral model and were interested in things like that. And this person thought I might be interested in Holacracy and so I was actually scheduled to take your training in April of last year and then had to drop out because of some things that happened. So, you know, I was interested in bringing it to the company at that point in time.

And then in August of last year [2007] I was hired here and decided if there was any way to get it into this organization I would. And then, in September Gary and I kind of looked at each other and said, "Do you know about Holacracy?" And we realized we both had an interest in Holacracy and that we would really try to bring it into this organization and it would be a way of culturally changing the organization. And certainly to really making everyone's role much more clear.

This organization's kind of grown up over time where they added people and added people and added functions, and there's been no real 50,000 foot view where somebody looked at the whole organization and said, "Does this make sense?" and, "How should it really be done?" and, "What would be a better way of actually doing it?" Holacracy is helping us with that because we're able to really examine everyone's role and accountabilities and get very clear about what everyone is doing, what everyone needs to be doing. You know, what's the requisite structure and all that. And so it's really helping that and even much more than I ever imagined that it would.

Gary: And I might just add that it wasn't an easy or a quick sell to pitch the idea that we should throw ourselves completely into Holacracy. In a sense, Susan and I had to conspire. We had to really think intentionally about how we're going to bring this forward to the leadership of this organization and how we would bring them into the same "Ahas!" and insights that we had, first intuitively, but then see how that they might relate and really benefiting our organization. So it didn't happen overnight that the whole organization got into alignment with the idea. It was something that required quite a bit of intentional processing to get us to where it was a green light for everyone.

Brian: Right. So you mentioned several benefits you were looking for—goals you had. One was a cultural shift; the other was more clarity on roles and accountabilities. Can you tell me more about what cultural shifts you were after? What was your goal that drove you there? And then, with the roles and accountabilities, I heard you wanted more clarity—who was doing what—but I also heard something else about wanting to question more consciously how we're doing what we're doing, and what we're doing, and all that. Tell me more about those goals that you thought Holacracy would help with.

Susan: Well, basically one of the reasons I was hired here is to get things a little more organized. In other words, we did not have a strategic plan when I first came here. And so I started a strategic planning effort back in October of 2007. What that did was, it really help us identify what our intentions were going forward and what kinds of things we needed to focus on in order to make our intentions a reality. So what was happening was, we had a lot of activities going on but without regard to outcome. You know, what outcomes are we trying to get out of this? So we were trying to get really clear on exactly what we need to focus on so that we can reach our intended outcome.

One of which is to become the fastest growing transformational spiritual movement on the face of the earth. So I think you can imagine that's a pretty big thing. So anyway, we wanted to get our staff focused on that and kind of away from what they had been focused on previously which was just creating things—because they were very creative people—and focusing on specific goals that would help our churches thrive, help our leadership grow, and that sort of thing.

And, once we posed that strategic plan we needed a framework to get everyone into the plan. The plan helped us to have people take a look at priorities for the first time, but there wasn't that real capability, or that real process to say, "Okay, well, who needs to be doing what? How should it be done?" You know, that sort of thing. And what exactly should the aims of all these different groups be, and how should those aims be focused on exactly what we want to have as outcomes.

Brian: I'm hearing a connection between the strategic plan, or the vision at the high level, and the, "Okay, but what are doing to be doing differently tomorrow? How are we going to work together? How are we doing to make that plan real?" And Holacracy was one of your goals to bridge those two.

Susan: Exactly! And the aims, you know, the creation of aims and things like that. We haven't created all... we didn't create all the aims right away, but as we're creating aims it's helping people get a lot more clear on exactly what their department does in relation to the plan and how they're going to be serving the plan. And then how each individual person is serving that rather than serving their own end. It's kind of connecting the dots for us, and while we're not totally there yet, I think we've gone a long way and people have converted their job descriptions, to a large extent, over to roles and accountabilities now. And so we can see how those are playing out. And now what we can do is: We can start seeing where the gaps are and where there's overlap, and things like that. So it's really kind of helping us be more explicit that way. So it's helping us to really shift the organizational culture.

I mean, first of all, the organization has a very implicit way of doing business. Everyone got to create whatever they wanted and they just kind of did their thing. People were very creative and all of that sort of thing. But there was no real tie in to an overall plan. And so now we're getting really focused, we're getting a lot more explicit with what everyone's doing, and we're able to actually see how we're gonna make progress on it.

And one of the things I wanted to highlight is that Gary and I are working on revising the performance appraisal system so that it will go along with the roles and accountabilities. And so that, obviously, there will be some tie-in with the aims and all that sort of thing. We're not there yet, but that's another thing and, of course, we would welcome anyone's suggestions on how to do that because we're not necessarily experts on performance appraisal systems, but we really want to get something that ties into the whole.

Gary: So, Brian, one of the... the context that I've had within which I see Holacracy as being an answer to is—from the standpoint of the Integral model and the principle of second-tier leadership and second-tier organizational dynamics—what I saw was that our organization basically operated fundamentally out of first-tier imperatives. We were very much driven by situations and circumstances outside of ourselves. We were very top-down as far as how communication and how directives were initiated and responded to. And from a second-tier perspective what we really needed to create is not just a flat organization but an Integral organization—an organization where all the parts were not only connected but integrated in a way that the whole organization could come alive and, as you've described, awake.

And part of the benefit of Holacracy is that once you are committed to the practice everything that is unlike being awake and conscious and intentional and congruent starts to show up. And so one of the real powerful benefits, if it could be described as such, is that what you get to see early in the practices are all the ways in which you're not congruent, or you're not coherent, or you're really not in alignment with second-tier principles. And that's a real necessary insight to really be able to create a healthy, thriving organization. And so I think that's, from my perspective, one of the most palpable benefits of the practice.

Susan: You know, Gary is always very eloquent in describing these things because he's had the opportunity to do his dissertation so he's always coming from that standpoint. But from the standpoint of the people, I think, one of the things that is important for them... you know, previously it was a very hierarchical organization and this was before our current CEO. And, my time here, certainly before that. But, basically people did not participate. They really didn't get asked for their participation or their input into decision making. And so now, everything is being integrated. All perspectives are being integrated and therefore they have an equal opportunity to make an input and have their input heard and have it integrated along with everyone else. Initially, that was really difficult for people. It's like they weren't used to that. And so had to kind of had to get them into that. And now, they are into it and they're seeing that, "Yeah, my inputs really do matter! I do need to bring whatever I have to say to the table and it's going to be integrated equally with everyone else's," and that sort of thing.

And also, of course, the fact that now we have representation from each of the circles on the leadership circle so therefore, you know, they're being heard to an even greater extent than just if they're lead links where they're so... you know, I think people are impressed by the fact that they're able to participate now. I don't know if they're taking full advantage of it yet. I don't know if they see the full possibility, but we've gone through several cycles where things have come up from people, you know... receptionists, people like that, where they're seeing that, "Wow! I can bring something and it's decided upon and everyone makes an input and we all get heard," and it's really big for them. So, from the standpoint of participation, it's helped increase the participation and let them know that their perspectives matter.

Brian: And are you seeing that those perspectives actually help drive improvement or changes in the—positive changes—in the business direction, the strategy, the achievement of the overall aims of the organization? Are you seeing that participation, yet, start connecting into improvements in the overall outcome?

Susan: Absolutely! And, also cost savings. Because, for instance, one of our receptionist who happens to sit as a rep [representative link] on our leadership circle brought in a cost saving measure that everyone else would have missed. I mean, she's the one who's responsible for that, or accountable for it, rather. And she brought it to our attention that, "Hey, we probably don't need to do this anymore." And everybody looked at it and went, "Whoa!" We never would have seen it and we're in the middle of a budget review right now. So, yeah, I think it's really big that, you know, they are the ones who are on the line, they're the one who are seeing these things, they are the ones who are bringing them forward, and it's given them an avenue to do that that wasn't previously available.

Brian: Fascinating! Fascinating! Now, I think you also highlighted two benefits that sound like they're likely challenges as well. One is that increased participation and the challenge that goes with now helping people find that voice and know how to use it. And then the other that, Gary, you hit on, was the benefit of um... Oh, what was it? You were just talking about it. I missed it. I lost it.

Gary: It was benefit of seeing where you're not coherent or congruent...

Brian: Yeah, yeah... it's surfacing all these new areas that perhaps aren't aligned or aren't generating the results you need and highlighting them and bringing them to the surface. That sounds like a challenge as much as a benefit. How did you... how was that experienced in the organization and how have you worked through that learning curve?

Gary: Primarily it's experienced in our governance process where we will... it'll surface for me as far as people bringing their accountabilities and roles to the governance process and basically saying, "This is what I understand I'm counted on for." And then for everybody to have a sense of how that not only exists in terms of that individual's purpose but how it effects everybody else. And we get a chance to have the conversation about the fit of those particular responsibilities that an individual has with respect to everything else that's going on. And to learn about things that people are doing that either may be unappreciated, or unnecessary, and to be able to see both ends of the spectrum, and then to have a kind of group learning about what's happening in the organization.

Sometimes it feels as if a person's... for me, for instance, I brought one of my—what I believed was one of the accountabilities that I had—and everybody disagreed with me [laughter] in the governance meeting. They said, "No, that's not your job." And it wasn't that it wasn't my job, it's just that the clarity around which I expressed or articulated what is it that I thought it my area of responsibility wasn't a right fit for everybody to really feel that it was coherent or really serving the broader aim of the organization. And not only did it help me become more explicit in my role with regards to the organization, but it helped everybody through the process of understanding how they contributed and supported me in it.

Brian: Yup, yup. Fascinating! That's a great example. What other challenges did you face? I mean it sounds like has been a pretty major change culturally and in terms of the process and the structure. What other challenges have you wrestled with in getting there?

Gary: Well, the biggest one is people's... the effort that people had to experience in terms of doing the discipline of all the meetings. The biggest push back was the frequency of the governance and the operational meetings and that seemed to be the biggest resistance that we had. People just saw that as a huge hindrance and it took a while to overcome that resistance where people understood the reason why the different meetings were why the way they were, and the different practices within each of those meetings were the way the way they were.

Susan: One of the things though that might be said about that is in other organizations were you have frequent staff meetings, or whatever, it might not be the problem. But in our case, the organization had not—other than the leadership team—the departments had not been having weekly meetings for instance. It was very interesting to me when I first got here, they just weren't really meeting. So things weren't being passed down to the departments, and it was really... the communication was somewhat lacking. So for them to ratchet up to all these meetings all of sudden was a big deal. But in a normal organization were you were having weekly meetings and everybody was used to that it probably wouldn't be the same thing. So, I just wanted to highlight that. And I think that, I mean, there were some benefits of that in that information increased—cross flow of information, cross talk—you know, knowing about

projects and all that, has certainly increased and people have found that to be of benefit. But they did push back on the number of meetings initially. And, of course, as you said, it takes more governance meetings initially to get going, and then you can back them off to once a month or whatever you need at that point.

I guess the other push back is... we haven't really yet had people jump wholeheartedly into the use of the software. And so, we're basically paying for the software and we're not sure how many people are actually using it. But I think if we populate it with more and more things—especially policies and procedures and things like that, which we're working on—that it will be used because that's where those things will be resident. Not anywhere else. I mean right now we've got them on a shared drive and people just kind of go there, or they go to a hard copy, or whatever. And so as we're withdrawing those avenues I think they'll use the software more. So, basically, right now we still don't have full use of the software. Can you think of something else, Gary, where we've had push back?

Gary: Well, the other area where... if we were to think about the pure practice that we were taught at the Facilitator's training, the use of the cork boards has been somewhat of a challenge for us in terms of the whole office sort of having a uniform practice. What has happened is that because of the uniqueness of each department and their operations, they've had a tendency to either default to just doing it the way they want or not doing it at all. So that's still a work in progress. We've released everybody to create innovative ways in which the corkboard could become relevant to their operations, but right now where we are is that most folks have basically abandoned the cork board. They did their stand-ups in front of it [laughs], but they're still not using it.

Susan: Yeah, another thing as far as push is concerned is that we're—in Spiral Dynamics terms, a very Green [Relativistic value Meme] organization—and everybody's used to connecting, and speaking, and everybody speaks all the time, you know. So we had a little bit of push back as far as following a very disciplined process during meetings and so the facilitators had to be ruthlessly compassionate about cutting people off. But, basically, I think once people saw how the process actually served them, they're more getting on board with the process. Although we still need to cut people off because everybody likes to talk and sometimes they talk up at the wrong time. Having a disciplined process was not in their way of doing things and we're still kind of working that. But it's going much better than it was in the beginning.

Brian: And are you seeing people actually relaxing into that then? I think you were saying, at first it's more resistance and then as they get used to it, and you said as they begin to seeing the benefits of it, is that when it's starting to kind of relax and they see it's actually helping?

Susan: Yeah.

Gary: I think one of the big turning points happened when all of a sudden people began to understand the difference between a governance issue and an operational issue. Part of the struggle was that they didn't know what they could talk about during governance. And as much as we attempted to explain and go over in great detail what the differences between governance and operations are... until they actually got it to where they were very much catching themselves in the process of, "Oh, well no, I've gotta withdraw this proposal. This is an operational issue." Until those things started happening, it didn't seem to click. But now people are relaxed—a lot more into the process. Our governance cycles are now monthly instead of every other week and it's much smoother. I think... well... I just lost my train of thought. I'll have to pick it up later.

Susan: Well one of the things that... you know, you talked about relaxing into the process—maybe while Gary's picking up his thought here—is that I noticed that once people could start laughing at themselves or laughing at the facilitators for cutting them off. Once they could lighten up a little bit, because initially they were frustrated by it, you know, it was really kind of arrrggg. But now they're laughing and, it's like, "Okay, okay, I should of waiting." Or they object to something out of turn. I think it's getting a lot easier for the facilitators now and for the people to recognize, "Okay, I was ahead of the process and it's okay. I'm okay with that." Because initially they were kind of miffed by it.

Brian: Yep, so you've seen that relax again. What about... You mentioned the split between governance and operations, which is... One of the core aspects of Holacracy is getting that split and allowing a space to do governance which normally gets missed.

Now, it's really interesting to me... It is a really hard concept to explain to people verbally, and often when people first learn about Holacracy there's a sense of, "Well, okay this makes sense to me, but how am I gonna get the receptionist to get it? How am I going to get everyone in the organization to really start getting this?" And you said something really interesting, which was, you tried to explain it and that was a challenge because people weren't getting it. But then with time and practice you started seeing that happen and, I'm wondering: how infused is that within the whole organization... the sense that we have a space of governance and we have a space for the more operational issues?

Susan: Well, one thing I'd just like to comment on before I talk about that is that I think what was happening was, when they were bringing specific issues, we were taking time during the meeting to explain. If they brought a really good governance issue we were really explaining, "This is a great governance example. This is exactly what we're talking about." Or if they brought an operational issue into governance we would stop the meeting, take a little time out, and explain why this is not governance. So, I mean, we took time really to explain it. I would have to say that it's probably infused through about, maybe two-thirds to three-quarters of our organization right now.

I would say there's still one circle that has a little bit of a challenge with it. For whatever reason, they just really haven't fully embraced it. But I would say the rest of them are really going and it's funny because the two circles that I thought would have the most difficult time with it seemed to almost embrace it the quickest—certainly one of them.

Gary: My sense of the reason why there's a few circles that aren't up to speed is because the lead links have yet to really embody the principles of Holacracy and the context of what the lead link role is, and have yet to really be a voice—an advocate—that this is a practice that we need to get good at. Instead, the attitude is, "Well, we need to do this because this is what we've been asked to do."

Brian: Right.

Gary: So disproportionate ownership on the leadership level of certain aspects of the practice.

Brian: And I think that highlights the shift that you've had to help the organization through, and are continuing to help them through. It's not just for the workers—we talked a lot about that—but it's as much of a shift for the managers and the executive leadership team as it is for the front-line people.

Susan: Exactly!

Brian: Interesting. Well, I wonder if we can step back and talk about how you've gone about rolling this out. This is a 40 person organization to start. And that's, even at that, a pretty sizable change project. And there's part of it I know, which is that you guys came in January last year, 2008, and went through our facilitator training and then you had us, HolacracyOne, come out and do a two-day workshop for the whole staff there and then two days of actual hands-on: working with your circles, facilitating your initial meetings.

There was kind of this kick-off where you got two internal people—yourselves—trained up. And then you had us come in and do a broad training and then kick it off for each circle. We facilitated governance and operations meetings for each circle. And then we left and you guys continued the change management project internally on your own after that. So tell me about... How did you do that then? Walk me through the process of getting this rolled across a 40 person company.

Susan: Yeah, well I think one of the things to mention in what you just said was that we had complete buy-in from our CEO. So, in other words, we had top level buy-in and as you can remember, he actually sat in on the training that everyone was in. So it wasn't like he was separate from, or whatever. He was right there with us and showed complete support from the very beginning for it. And I think also the fact that Gary and I sit at a pretty high level in the organization also helped. I mean I think that if it was, you know, if we sent two people who were really at a lower level in the organization it might have been more difficult for them. But, we sit on the leadership team, and so therefore we were right there at the forefront of it. So that helped.

From the training then, and from your work with our groups—of course, as you remember, I said we kind of took a little bit of a hiatus because of our annual convention that was in June of last year [2008]. But then what happened was Gary and I went back in. We started facilitating governance and operational meetings—tactical meetings—for the circles, and we facilitated for a few weeks. And then we held the training session once they got their elections done. Of course, you guys did the elections with them. But once we got the elections done and we had the facilitators, and they watched us facilitate for a little while, then we had training for the facilitators. And so we trained four facilitators for our circles and, of course, Gary was the facilitator for the leadership circle.

So then, once we got them trained on exactly what to do, and what to look for, and that sort of thing—and how to coach people through the process. Then we actually were there while they facilitated. And we did that for quite a while and continue to go back and audit those periodically to see how they're doing, you know. We just want to make sure they're holding to the processes and things like that. So we got to the point where—nothing formal—but we got to the point where we felt comfortable with the facilitator. And kind of one-by-one, they got blessed, that you can now go off and facilitate by yourself. And they did. Every once in a while we drop in, we see how things are going, and that sort of thing, but we don't really feel the need in three out of the four circles as engaged anymore. We're still somewhat engaged in the fourth circle making sure they're on track, but the other circles have really good facilitators, and they're really do great work. So, that was really it.

Then, if you look at... We'll I think I said originally that we started implementing certain meetings. I mean, we certainly changed the structures of our tactical meetings right away after we had the training. So we came back and did that. We created stand-up meetings and gave everyone the agenda for that. Of course, we had the lead links spun up on that and they were leading those things. We also trained the lead links on facilitating their tactical meetings. We had some training for them to make sure they were doing what they needed to be doing, although that seems to be much easier than facilitating governance, obviously. You know, there's more to governance.

But we got the meetings going and we had special meetings. We make sure that we peel certain things of the agenda and turn those into special meetings whenever. So that's working well. And then, we just recently had... back in November we had a strategic meeting. We've been having strategic meetings previously but we really highlighted to them in November, this is a strategic meeting, this is why we're here, and all that. Now we have all the meeting structures up and running and I think that's really helping too.

Brian: Yeah. I love how you built up, effectively, a skills hierarchy within the organization. You've got everybody at least knows enough to take part in the governance and tactical meetings, the operational meetings—they could participate. Then in each circle you trained a facilitator who knows the process a little better and can actually facilitate it; there's expertise there. Then you have another level of expertise above that where you've got two internal experts—yourselves—and you can advise the facilitators, as needed, and model for them and help them get up to speed. And then you've got us [HolacracyOne] as an external party to come in and do the kickoff with you and originally help you guys get up to speed. So you've got a whole hierarchy of expertise here that's helping the practice sustain through the organization.

Susan: Exactly! And of course Gary and I fill in if someone's on vacation or somebody's out for some reason, so we're always there in case they have any questions or they need somebody to fill in, or whatever.

And also another thing too is, we've got some new people who just joined the organization and we've given them—you had left with me several extra training manuals—we've given them the training manuals and now what we need to do is setup a little overview for them so that they're... But they're already participating in the processes; they just need to have a deeper understanding. And two of those are two brand new directors so those people really are gonna need some training.

Brian: Yeah, it's interesting to see. I think without any one of those levels or layers in there, of expertise, it would have been harder to rollout and sustain. You guys can't facilitate every meeting in the company always. Without you though, those internal facilitators though wouldn't have had the experts right there in the organization to talk to.

Susan: Exactly.

Brian: And then you guys have us that you can fall back to when you have questions or when you need some extra outside thoughts. I think that's a great approach of... It was a partial with help from HolacracyOne and us then a partial do-it-yourself internal implementation. And I think you got many of the best elements of each that helped us really roll out and sustain.

Susan: I think one of the things that helped us, Brian, was the fact that your training with us as facilitators was so extensive. I mean I feel like after a week—of course, we were really interested and exciting about it anyway, I mean, we got into it and did a bunch of reading before we came there. But your training with us was so extensive and we felt so comfortable after we got done with the training that we were able to come back here and do what we did. You know, I think if we had had any less training, or whatever... I mean there's no way, if you didn't have the facilitator's training, there's no way you could have done what we did here.

Gary: And we ended up actually—after the facilitator training—creating our own training events using your slides to our presentations, to our leadership, and some of our key staff, and some of our strategic partners. And so we had a lot of practice in terms of presenting the overarching principles and elements of the Holacratic practice so that, by the time we actually got to implementation, we had most of the language elements in place and most of the people had heard the words before.

Susan: And I think there's only been one thing you corrected us on, basically, since then. And that's that the leadership circle was trying to create rules for the other circles. You know, instead of just creating accountabilities and letting them create their own rules. So, we started out doing that for a brief time and I think that was the only thing you corrected us on. I mean, basically, the training you gave us was so effective that we were pretty autonomous; pretty capable of just getting up and running.

The biggest thing for us was wanting to get the software up and running because we were capturing the meetings with word documents and, of course, those were posted and sent out. But it wasn't really as effective as now the Wiki is—or the software is—with getting those roles and accountabilities and all the other things we're creating into the software. So that was a big help. But anyway, I do think that the training we got was very extensive and it really helped us.

Brian: I appreciate that, but I think it had as much to do with you guys as it did with the training. But I'm really glad it worked out so well for you.

Can you tell me... summarize for me... You touched on a lot of the different benefits you've seen, but if you could just summarize those. What are the key points you've seen out of your practice with Holacracy now that are different than what you had before and benefit either the organization or the people within?

Susan: I'll let Gary start off on that one.

Gary: Well there's a greater sense of collaboration among all the different parts. In other words, there's a definable system within which we can work to process our issues, or concerns, or our tensions, and so everybody is familiar with that now. And so there's a way to work with both the challenges and opportunities of our organization.

There's a greater sense of—everyone's doing the same practice—and so everyone has equal capability in doing the process, and so when we sit in the circle there are no superiors and subordinates. Everyone is an equal player and everyone has the ability to question or to contribute to any issue that comes up. And that's something that I think is extremely powerful and people all recognize that together that that's very much apart of our community now.

There's a greater willingness to really be focused on what's happening right now and not be so far ahead in the future and so “predict and control” is less and less.

And there's a great feeling of appreciation that we can actually, as an organization, practice some of our spiritual principles such as: be here now [chuckle], and let us allow the consciousness of the organization to express itself as opposed to our fears and concerns dictating what steps to take.

Susan: Individual egos, you know, getting the egos out of the way. That is all part of our spiritual practice. From my standpoint, I think I said earlier, when you're really a CEO or COO and you're looking at implementing a strategic plan—and you're wanting to get everyone really moving in that direction. And so if you have the plan—and then you have the circles, and you have circle aims, and that sort of thing—and you're wanting to get everybody focused so that nobody is doing anything that's outside of your mission, or outside of the aims of their circle, and that sort of thing. I mean, they're not just kind of going off on tangents. That's not to say people don't take individual action, because they do, but everyone has a particular focus and everyone's moving in alignment with that focus. That's really big! And it's been really big for us to get everybody kind of doing that, especially from the standpoint of—not only the effort that people are making on the projects and programs they're working on—but also in our budgeting. It's to try to see, who's doing what? Why are they doing it? How can we be more effective in doing thing? And that sort of thing.

And also in the... You know, I talked about saving money. We've been able to identify some cost savings. Not huge yet, but I'm sure that as people get more and more familiar with the process they'll be

able to come up with more and more things that don't make sense. That there are tensions, not so much just for them but for the whole organization, that the organization may not even realize. So it's been really good for us from that standpoint too.

Brian: Great! Now, Gary, you touched on, just a little bit there, some of the shifts into more of a “dynamic steering” paradigm. Getting away from some of the predict and control, and that's not necessary, and more flowing with what's happening with the organization and the business. I'm curious if you've seen that dynamic steering start to infuse how you actually go about providing your services or show up in other aspects of the organization. You mentioned the performance management plan, things like that. Are you seeing the dynamic steering infuse and what benefits are you seeing coming from dynamic steering now?

Gary: Well, I don't think it's risen to the level of people saying, “Oh, we're dynamically steering right now, in the moment.” I think for us right now it translates into a sense of good enough. We don't have to have everything done so perfectly that we worked out all the possible pitfalls. There's a high degree of, “Let's just try it. Let's look at it and see if it works and if it doesn't we'll come back to it.” There's more of that energy as opposed to we're actually steering the organization. I think on the leadership level there's certainly a sense of knowing that we're dynamically steering but, in terms of organization, I don't know that that's what it feels like from the whole organization—all the people in it. That's my sense. Susan might have a different sense.

Susan: Yeah, I think if you talk to them about dynamic steering they wouldn't necessarily get that feeling, but we can see where it's happening. Even though we have a strategic plan, there's a lot of things that we do—a lot of services we provide and things that are kind of in the maintenance—they just kind of happen, that aren't in the plan. I mean they're things that we just have to do that don't require goals. They're just ongoing services. And they way we perform those services is being looked at continuously. And to see: Can we work smarter, not harder? What's the way of doing that? How can we dynamically steer some of these services? And things like that. As well as dynamically steering the goals.

For instance, we realized that one of our major programs wouldn't be able to start because we didn't get one of the grants that we applied for yet. And so we were able to kind of dynamically steer that. So I think we're seeing it at the leadership level. I don't think we've been as overt about pointing it out when it happens to the others. I mean, it's just kind of happening. It's not something that everyone's conscious of.

Brian: Well, and I love that, actually! It's a really good sign, I think, and a fascinating point. The language isn't actually what's important. It's not just the talking about it, and looking at it, and pointing it out. What you're seeing is the results of it in action. You're actually seeing things get revisited and improved upon, regularly. You're seeing opportunities surface and get harnessed that would otherwise be missed.

Susan: And one of the people said to me today, “Can we look at this again in a few months?” And I said, “What's our key principle here?” And he says, “It can be revisited at any time.” And they smiled like, “Yeah, okay.”

Gary: Another thing... We just lost one of our facilitators who got hired over at Unity School. We hired that person's replacement and the secretary of that circle asked, “Well, what happens if we elect John—who's this new person who started yesterday—a facilitator?” [laughter]. And so the idea is that we can't say, “Well, no you can't do that.” What we have to say is that, “Well, if that happens, then we'll use it.

We'll use that person's total lack of any understanding and we'll train that person, or we'll do whatever it takes to deal with that circle's need." And, of course, we have to ask, "Well, is that the best fit?" [laughter]. And they can deal with, "Is that the best fit?" It's probably someone who's been around a little longer. I think in a lot of these cases, especially because everybody had the training, we can use the language a lot of times when it makes sense and people get it. It's like, "Oh, oh ya. I forgot that."

Brian: So as we start to wrap up here, I'm wondering, can you tell me if you were talking to two executives in a 40 person firm that were just now thinking about adopting Holacracy and implementing it, what advice would you have for them about how to go about that process and get it rolled out across their organization?

Susan: Well, first off, I would say go for it!

And second of all, I would say it's really critical to have top leadership on board. And, of course, in some organizations that means the board. In our case we kind of did it here in the home office without the board on board, although we have board members who are just chomping at the bit. So it's really important to have key leadership on board. I think if we had not done that we would have never been able to do it as quickly as we did, and that sort of thing.

And then, I think it's important to really make a full commitment. I mean everybody has to have the training. It can just be a few people get the training and that sort of thing. Everyone's gotta go through it so everyone has the basis for getting started. And then, you just need to jump in and start practicing. It's really... It's almost like, "Are you willing to take a risk?" You know, people will make mistakes. There were people in the beginning who were afraid of making mistakes and we assured them, "It's okay. Don't worry about it." It's just the way it is. We're gonna have to jump in. It's gonna be a little bit messy. And, we just go for it. So, I mean, it's just important to start engaging in the practice as soon after you've had the training as possible so that you get familiar with it and used to it.

Gary: I think it would be important for there to be a real conscious intention around the implementation. I think that you just can't send a couple people for the training and then see what happens next. There has to be, I think, a definite plan. If we're going to do this, we're gonna get the highest level of leadership possible trained. We're gonna have enough of trained facilitators for our size of organization to be able to support the practice. We're gonna need to have HolacracyOne come out and do some kind of on-site orientation and implementation.

And then, in my mind, what is one of the benefits that Susan and I bring that might be valuable to anyone considering Holacracy, is that we have a rich background in Integral theory and Spiral Dynamics. And because our spiritual context is very much aligned with what you teach, Brian, or what HolacracyOne represents, I think that also gave us an edge that is important to our success.

Susan: I think that what Gary's saying is really important. And one of the things that you probably need to know too is that we actually created a goal about actualizing the demonstration. So we created a goal that the home office would demonstrate the Holacracy organizational paradigm. And we originally said we would do it by December of this year [2009], but we moved it up to June because we see that we're doing it faster. So we set a particular goal to have it done. And I think that's really important in anything you're doing, is set a particular outcome and then meet that outcome.

Brian: Yeah, yeah. Well, I'm so excited for you guys! It sounds like you're off to an incredible start and things are moving faster and better than expected. And, I just admire and applaud your courage. You dove head first into this and did fully commit yourself to it, and made it work. And you know you're gonna be one of the, I think, premier first case studies of what this can look like in an organization. There's a handful of them now and you're among them.

Thank you so much for all your energy and all your effort, and taking the time to share this with so many others. And pave the way for others to follow.

Susan: You're welcome and thank you for all the support you've given us and all the support you're giving everybody we know out there in the field. We think Holacracy is very important and we intend to continue supporting it, and participating in the practice of it, and we would be willing to answer questions if people have any or do whatever we can to support getting this out there farther and wider.

Brian: That's great! Thank you both so much.

Gary/Susan: Thank you!

Brian: Have a great day!

Gary: Alright, bye, Brian.

Susan: You too, thanks, Brian.